



Defense Civilian Personnel Data System

11i Quick Start Training Guide



March 2003

**Defense Civilian Personnel Management Service
Regionalization and Systems Modernization Division**

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Lesson 1: Navigation in 11i

NOTES



This lesson will show you how to login, navigate, and review changes and new features in Oracle 11i.



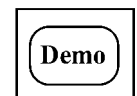
After this training, you will be able to:

- Navigate in the application using the Icons and Shortcut Keys.
- Use the Date Track feature.
- Access On Line Help.
- Utilize new features available in Oracle 11i.



Becoming comfortable with the system navigation, various functions, and tools is one of the keys to your success in using Oracle 11i.

- You must understand the Date Track feature, because you will use it to some extent with every action you process or record you view.
- The Online Help features can greatly enhance your ability to understand how to accomplish tasks using Oracle Applications.



Turn to the Demo and observe while I:


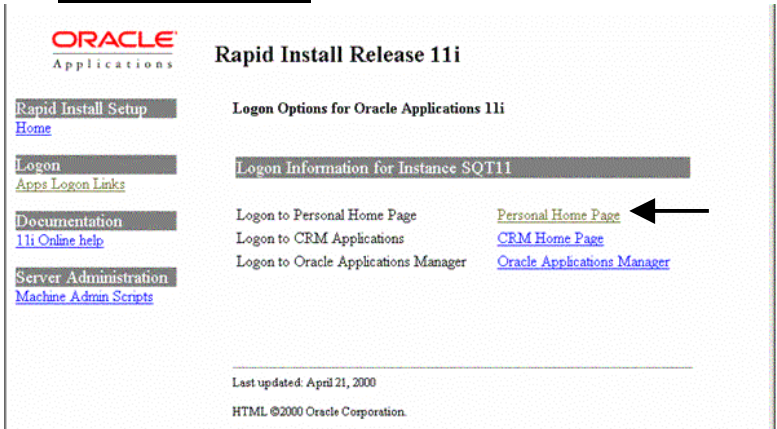
- Login and select a role
- Navigate through the Menu and create my Top Ten List
- Review Toolbar Icons, Functions and Shortcuts
- Use Date Track and On Line Help
- Review changes and new features

DEMO

Logging On

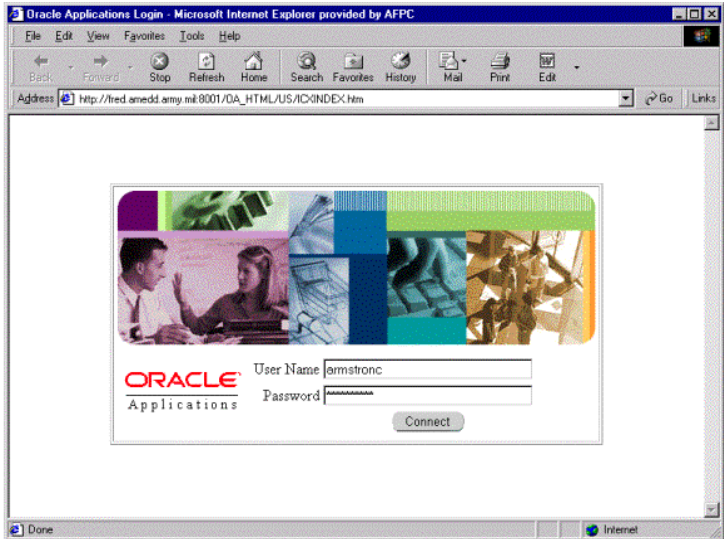
Logging On

Follow these steps to log on:

Step	Action
1	<p>Click on the Oracle 11i Icon on your desktop. The Oracle Rapid Install Release 11i Web Page will display:</p> 
2	<p>Click <u><Apps Logon Links></u>.</p> 

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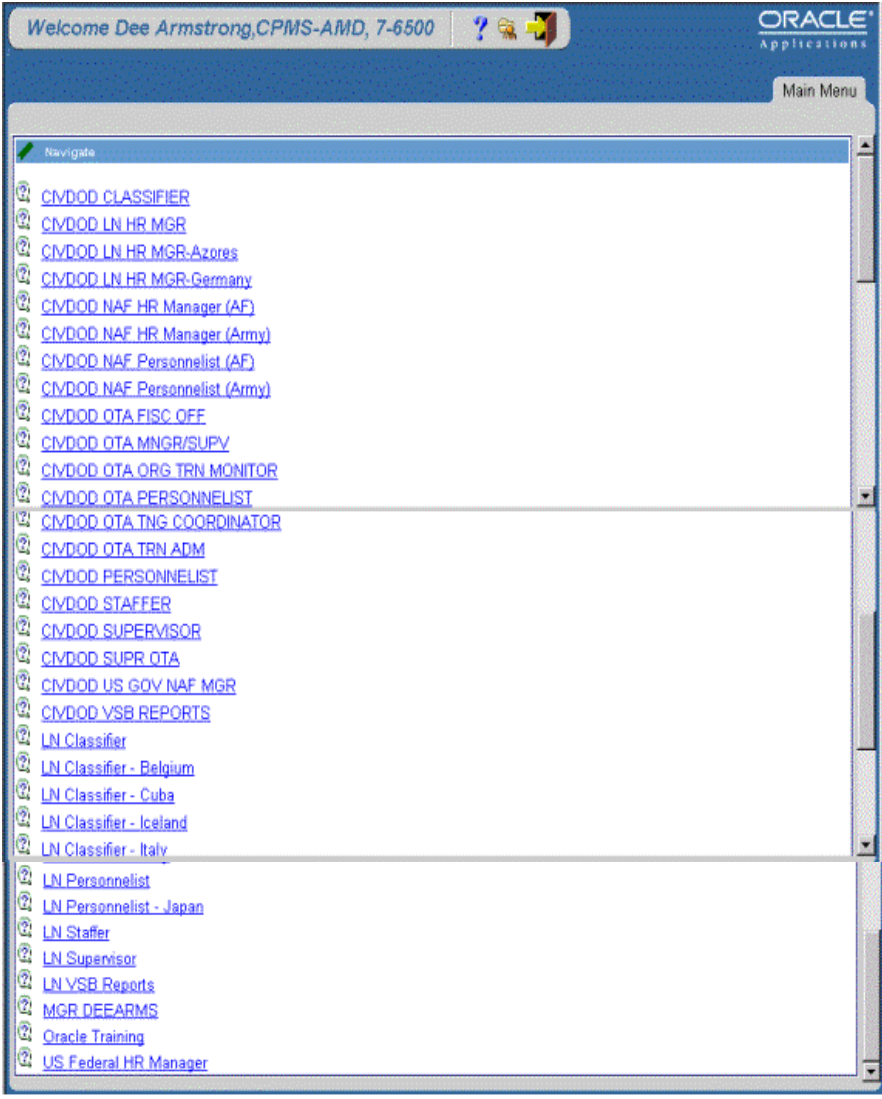
Logging On, Continued

Step	Action
3	<p>Click <Personal Home Page>. The Oracle Application Login Window will display:</p> 
4	Type your assigned User Name in the User Name field.
5	In Password , type in the Password field. Click <Connect> (or Enter).
6	<p>If you have established an 11i Password, disregard this step.</p> <ul style="list-style-type: none"> If you have not established an 11i Password, a screen will display which will ask you to type in the old Password and your own unique password (twice). Click the <Connect> button.
7	The Welcome Window will display with the roles assigned to you.

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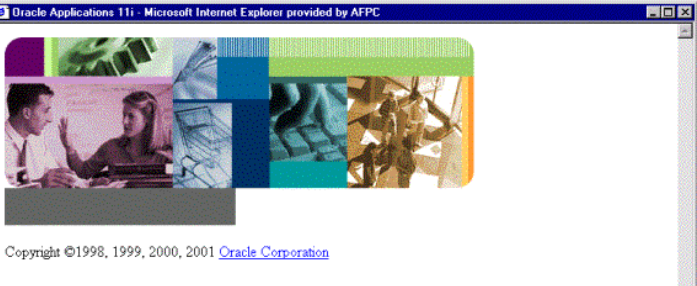


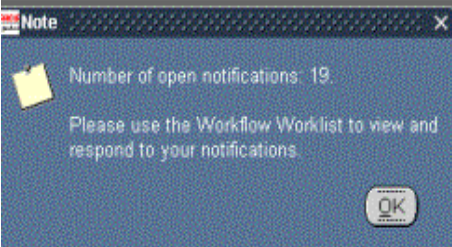

Navigating

Welcome Window

Step	Action
1	<p>On the Welcome Window, select your role and double click. For example: “CIVDOD PERSONNELIST.”</p> 

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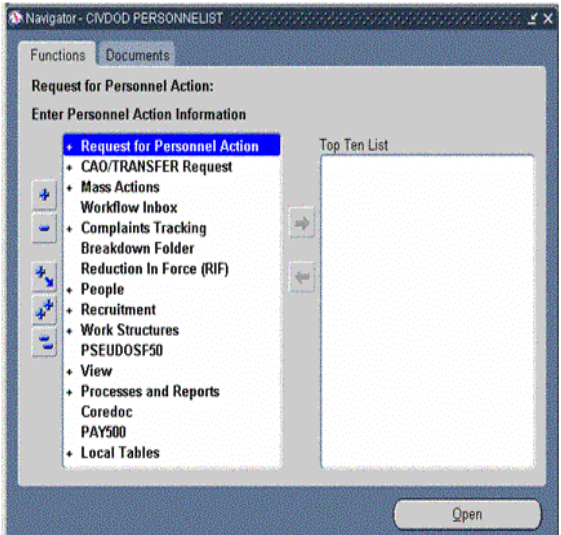
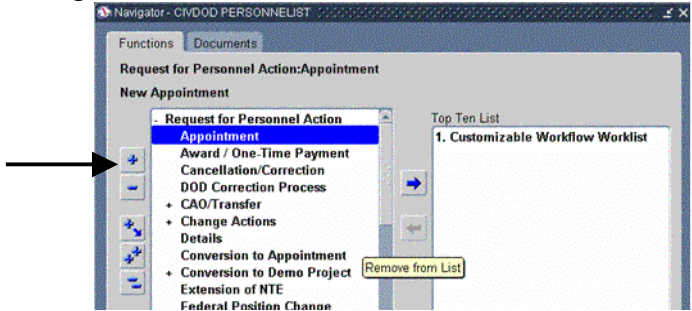
Navigating, Continued

Step	Action
2	<p>The Oracle Application 11i Window displays as it is connecting.</p>  <p>Copyright ©1998, 1999, 2000, 2001 Oracle Corporation</p> <p> Note: The desk top bottom toolbar displays:  Oracle Appl.</p>
3	<p>If you have actions in your inbox, a notification will display:</p>  <p>Refer to the Workflow Inbox Lesson for more details. Click the <OK> button.</p> <p> Note: Ignore the hour glass which stays on.</p>

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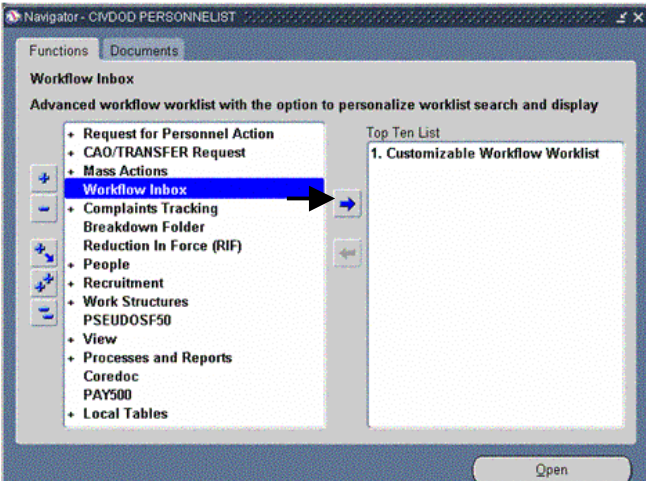
Navigating, Continued

Navigator Window

Step	Action						
1	<p>The Navigation window will display two tabs; Functions and Documents. This list of functions is the starting point to process actions, i.e., build positions, maintains employee records, run reports</p>  <table border="1"> <thead> <tr> <th>Tab</th><th>Description</th></tr> </thead> <tbody> <tr> <td>Functions Tab</td><td>The Navigation List will display the various functions you can access with the role you selected.</td></tr> <tr> <td>Documents Tab</td><td>Not currently used by DoD.</td></tr> </tbody> </table>	Tab	Description	Functions Tab	The Navigation List will display the various functions you can access with the role you selected.	Documents Tab	Not currently used by DoD.
Tab	Description						
Functions Tab	The Navigation List will display the various functions you can access with the role you selected.						
Documents Tab	Not currently used by DoD.						
2	<p>You may click on the plus sign to expand the functions and the minus sign to contract them.</p>  <p>Double click on the item to start a process, or click <Open>.</p>						

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Navigating, Continued

Step	Action
3	<p>To set up a Top Ten List of your most frequently performed actions, highlight the item on the list and click the middle arrow key to the right. The item displays under “Top Ten List.”</p> <p>For example: Highlight Workflow Inbox and click the arrow key. The Top Ten List populates with “1. Customizable Workflow Worklist.”</p>  <p>To view your inbox in the future, you only need to type a “1” to open the Work list.</p>

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System Changes/New Features

System Changes/Description/Function

System Changes	Description/Function										
Switch Responsibility	Replaced with a new icon on the toolbar (a derby hat). 										
System Times Out	Leave the Oracle picture on the screen, right click on the mouse and click "Refresh" on the menu. Saves logging on again.										
Function Key F8 is now F11 + CTRL F11	For Query: <ul style="list-style-type: none"> Place the cursor in the first blank data field. Press F11 and then Ctrl and F11 simultaneously. 										
List of Values (LOVs)	Are located within most windows.										
Wild Cards	<p>Wildcards are software tools that enable you to define a range of values that <i>begin</i> with, <i>end</i> with, and/or <i>include</i> specific letters, numbers, words, or phrases .i.e.</p> <ul style="list-style-type: none"> You may want to conduct a query of all the employees whose last name starts with the letter L. You may forget how to spell an employee's name and want to look up all of the employees whose last name ends in the letters th. You may want to look up all of the employees that have a birth date in the month of April. <p>The wildcard symbol in Oracle is the percent symbol on your keyboard (%). Wildcards can be used in any field that Oracle permits you to access while in the query mode.</p>										
Data fields	<p>Color denotes functionality:</p> <table border="1"> <thead> <tr> <th>Color</th><th>Types of Data Fields</th></tr> </thead> <tbody> <tr> <td>Blue</td><td>Query</td></tr> <tr> <td>Yellow</td><td>Required</td></tr> <tr> <td>White</td><td>Optional</td></tr> <tr> <td>Gray</td><td>Cannot be entered</td></tr> </tbody> </table>	Color	Types of Data Fields	Blue	Query	Yellow	Required	White	Optional	Gray	Cannot be entered
Color	Types of Data Fields										
Blue	Query										
Yellow	Required										
White	Optional										
Gray	Cannot be entered										

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System Changes/New Features, Continued

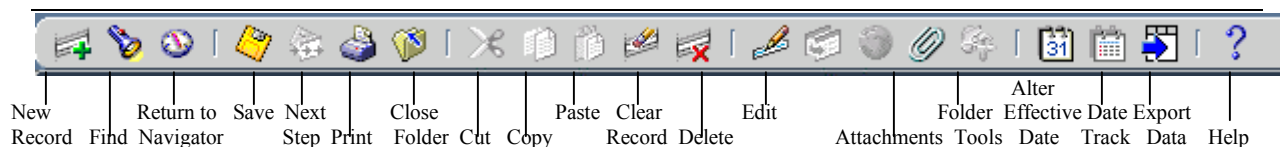
System Changes	Description/Function
If you cancel a realignment:	The employee goes back to previous position.
New HR Manager Navigator Menu Items: Record Types Tabs Position has enhanced Date Tracking RPA, Salary Change, Awards and Mass Awards	Career Management: (Rating Scales, Competencies, Competence Types, Competence requirements, Schools & Colleges, Qualification Types, Assessment Template, and Appraisal Template.) Employee – Ex Applicant: Someone appointed and hired in DCPDS. Employee: Someone who was converted from Legacy or moved from one region to another (Mod to Mod). Replaced alternate regions You can view all the history of changes that have occurred on a position. System calculates percentages.

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Toolbar Icons, Functions, and Shortcut Keys

Toolbar Icons

Click the Icon on the toolbar to display the function:











Functions, Shortcut Keys, and Icons in Alphabetical Order:

Functions	Shortcut Keys/ Icons	Functions	Shortcut Keys/ Icons
Alter Effective Date (calendar)		Find (flashlight)	
Attachments (paper clip)		Folder Tools	
Block Menu	Ctrl+B	List of Values	Ctrl+L
Clear Block	F7	List Tab Pages	F2
Clear Field	F5	Next Block	Shift+PageDown
Clear Form	F8	Next Field	Tab
Clear Record	F6	Next Primary Key	Shift+F7
Commit/Save	Ctrl+S	Next Record	Down
Clear Record (Pencil eraser)		Export Data (document w/blue arrow)	
Count Query	F12	List of Values	Ctrl+L
Copy (documents)		List Tab Pages	F2
Close Form (yellow folder w/blue arrow)		New (green plus)	
Cut (scissors)		Next Step (arrows on document)	
Date Track History		Next Set of Records	Shift +F8
Delete Record	Ctrl+Up	Previous Block	Shift+PageUp

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Toolbar Icons, Functions, and Shortcut Keys, Continued

Function	Shortcut/ Icon	Function	Shortcut/Icon
Delete (Red X)		Previous Field	Shift+Tab
Display Error	Shift+Ctrl+E	Previous Record	Up
Down	Down	Print	Ctrl+P
Duplicate Field	Shift+F5	Print (printer)	
Duplicate Record	Shift+F6	Return	Return
Edit (pencil)		Save (yellow disc)	
Edit	Ctrl+E	Show Navigator- returns to Menu	
Enter Query	F11 (Press twice to display last query)	Help	Ctrl+H
Execute Query	Ctrl+F11 (Use for blind queries to retrieve all records)	Insert Record	Ctrl+Down
Exit	F4	Translations	Not used
Paste		More Information Available	< >
Window Help (blue question mark)		Zoom	Not used
Switch Responsibility			

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Other Functions of the Oracle Applications Window

Window Functions

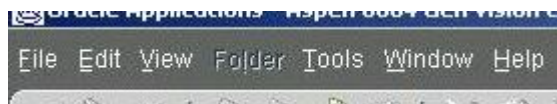
- Message Line: Oracle Applications display pertinent information for processing your form, including error messages.



- Record Indicator: Displays the information about how many records are retrieved in your query and which record is currently opened. For example, in the above screen you are in the 10th record of a total of 71 records.

Menu Bar

There is a series of pull-down menus at the top of the window. You can operate the pull-down menu using either keyboard shortcuts or the mouse. On the keyboard, use the Alt key to drop down the menu (e.g. Alt + Q for the Query Menu), the Down Arrow to move to the option required, and then Enter to execute.



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Other Functions of the Oracle Applications Window, Continued

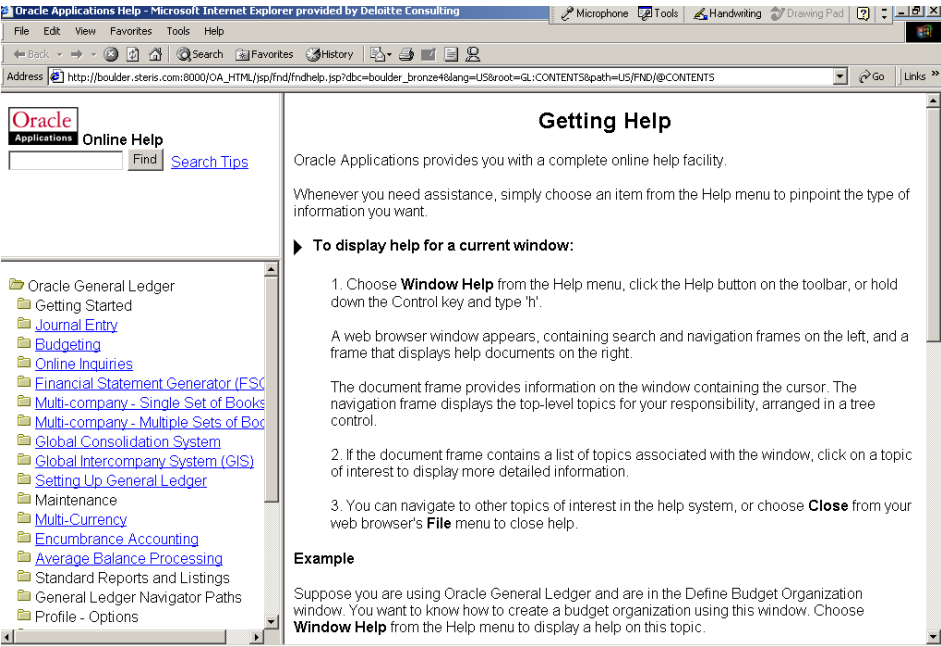
Menu Options

File	Edit	View	Folder	Tools	Window	Help
New	Undo Typing	Show Navigator	New	Options change depending on the application and form in use.	Cascade	Window Help
Open	Cut	Zoom	Open		Tile Horizontally	Oracle Applications Library
Save	Copy	Find	Save		Tile Vertically	Keyboard Help
Save and Proceed	Paste	Find All	Save As		List of Open Windows	Diagnostics
Next Step	Duplicate	Query by Example	Delete			Record History
Export	Clear	Record	Show Field			About Oracle Applications
Place on Navigator	Delete	Translations	Hide Field			
Log on as a Different User	Select All	Attachments	Move Right			
Switch Responsibility	Deselect All	Summary/Detail	Move Left			
Print	Edit Field	Requests	Move Up			
Close Form	Preferences		Move Down			
Exit Oracle Applications			Widen Field			
			Shrink Field			
			Change Prompt			
			Autosize All			
			Sort Data			
			View Query			
			Reset Query			

Continue to next page

Accessing On Line Help



Help Menu

Step	Action
1	<p>Select Help > Window Help > Oracle Applications Library. A Help window is displayed through your web browser tool, providing information and a list of topics associated with the current application window.</p>  <p>The screenshot shows the Oracle Applications Online Help interface. On the left is a navigation pane with a tree view of topics. The main content area on the right is titled 'Getting Help' and contains the following text:</p> <p>Oracle Applications provides you with a complete online help facility.</p> <p>Whenever you need assistance, simply choose an item from the Help menu to pinpoint the type of information you want.</p> <p>► To display help for a current window:</p> <ol style="list-style-type: none"> 1. Choose Window Help from the Help menu, click the Help button on the toolbar, or hold down the Control key and type 'h'. <p>A web browser window appears, containing search and navigation frames on the left, and a frame that displays help documents on the right.</p> <p>The document frame provides information on the window containing the cursor. The navigation frame displays the top-level topics for your responsibility, arranged in a tree control.</p> <ol style="list-style-type: none"> 2. If the document frame contains a list of topics associated with the window, click on a topic of interest to display more detailed information. 3. You can navigate to other topics of interest in the help system, or choose Close from your web browser's File menu to close help. <p>Example</p> <p>Suppose you are using Oracle General Ledger and are in the Define Budget Organization window. You want to know how to create a budget organization using this window. Choose Window Help from the Help menu to display a help on this topic.</p> <ul style="list-style-type: none"> • The Glossary provides help information by topic, alphabetically. The information contained in the Glossary is primarily a brief description of each topic. • Navigation Help provides information of the navigation paths to forms within each Oracle application. • The Library icon gives you access to online Help for any Oracle Application products and complete reference and documentation of the products

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Using Date Track

Accessing Date Track


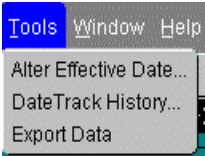
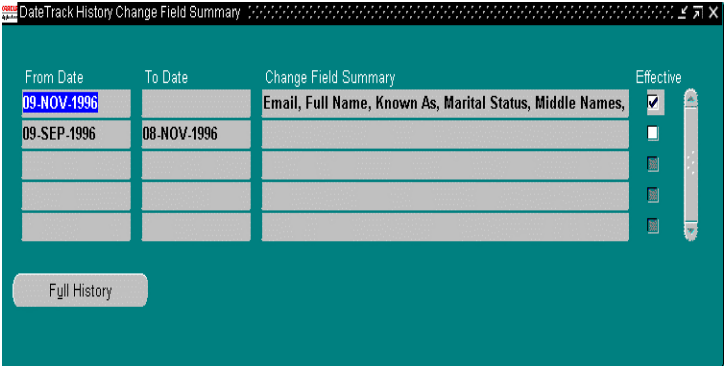
Step	Action
1	<p>From any window that contains “date tracked” information, click on the DateTrack button on your Oracle toolbar. The button is located near the right end of your toolbar, and it looks like this:</p>  <p>Or access DateTrack by using the menu bar commands Tools, Alter Effective Date. Once you perform one of these two actions, DateTrack’s Alter Effective Date window will appear.</p>
2	<p>Enter the effective date that you wish to create for your database in the Effective Date field of the Alter Effective Date window and click OK or press Enter.</p> <p>Oracle will exit out of the Alter Effective Date window and return to the original window. The new date will appear in the title bar of the as pictured in the illustration. </p> <p>Once the effective date is altered, all information entered, changed, or viewed will be treated <i>as if it were being accessed on that altered date.</i></p>

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Viewing Date Track History

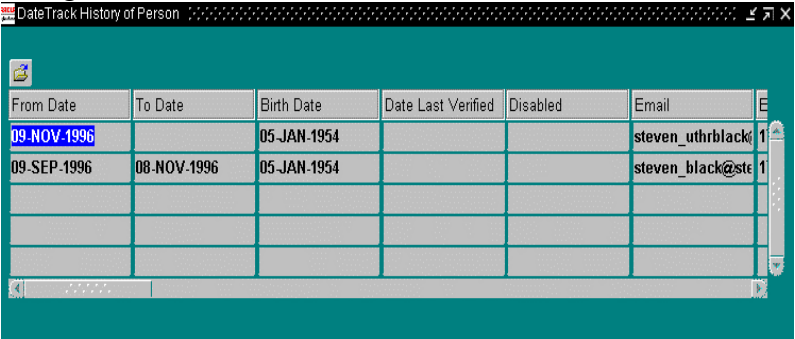

Date Track History

Date Track History shows all of the changes that were made to a date tracked record over time.

Step	Action
1	<p>Click on the DateTrack History icon on far right end of the toolbar. </p> <p>Or</p> <p>Click <Tools> in the menu bar and select Date Track History.</p> 
2	<p>Each row in the DateTrack History Change Field Summary window shows a field in the record that was changed on the effective date (i.e., the date that is displayed in the From field of the form currently initiated).</p>  <p>Click the <Full History> button in the DateTrack History Change Field Summary window.</p>

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Viewing Date Track History, Continued

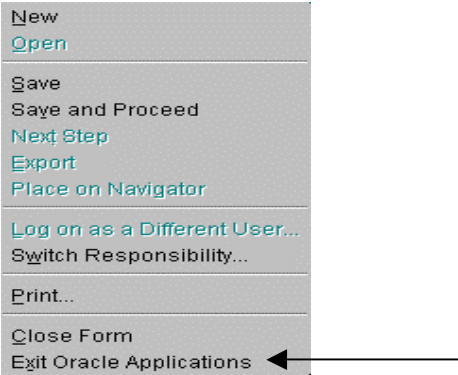

Step	Action
3	<p>The full history summary of the current record will appear, showing all of the fields and the date(s) when information was changed.</p> 
4	<p>To exit out the DateTrack History Change Field Summary and/or DateTrack History of Person window, click on the  in the upper right-hand corner of the window.</p>

Demo is complete.

Closing Oracle Applications

Closing Applications

Properly exiting out of the Oracle Application will save the changes you make to the Navigator, i.e., Top Ten List.

Step	Action
1	<p>Using the menu bar click <FILE> - Exit Oracle Application.</p> 
2	<p>The following caution message will appear – click the<OK> button to exit:</p>  <p>Close all remaining browser windows related to Oracle.</p>

Lesson 1: Navigation in 11i, continued



Begin the following exercises:

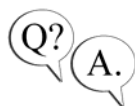
- Exercise 1 – Logging On, and using the Navigator Window
- Exercise 2 – Toolbar Icons, Functions, Shortcut Keys
- Exercise 3 – Accessing On Line Help
- Exercise 4 – Using Date Track

Approximately 35 minutes



Key discussion point(s)

- The way information is dated or Date Tracked provides a powerful tool for maintaining a continuous history of information
- The navigation menu is based on the role you have selected. If you have been assigned more than one role the navigation menu will display based on the role you have selected.



Questions?

NOTES

Lesson 1 Exercise 1: Logging on and Using the Navigator Window

Purpose Practice finding items in the Navigator Window and creating, modifying, and using a Top-Ten List.

- Directions**
1. Log on to the DCPDS. When you get to the **Responsibilities** Window, select *CIVDOD PERSONNELIST*.
 2. Navigate through the Navigation List as required to create a Top-Ten List that includes the following items from the Navigation List. You will need to use the “Expand” and “Collapse” functions to find some of these items.
 3. Items to Include on the Top-Ten List:
 - *Appointment*
 - *Enter and Maintain*
 - *Workflow Inbox*
 - *Position Copy*
 - *Employees by Position*
 - *View Reports*
 4. Remove 3 items from the Top-Ten List.
 5. Open any item on the Top-Ten List by pressing the number key on your keyboard that corresponds with the Top-Ten List number
 - To close the form and return to the Navigator Window, Click **File** from the Main Menu Bar and then **Close Form**.

***NOTE:** Refer to Demo for detailed steps.*

Estimated Time 10 minutes

Lesson 1 Exercise 1: Logging on and using the Navigator Window (Answers)

Answers

The Navigation List items you were asked to put in a Top-Ten List can be found as follows:

Navigation List Item	How to Find
<i>Appointment</i>	<i>Request for Personnel Action → Appointment</i>
<i>Enter and Maintain</i>	<i>People → Enter and Maintain</i>
<i>Workflow Inbox</i>	This item is on the main list (not a sub-item)
<i>Position Copy</i>	<i>Work Structures → Position → Position Copy</i>
<i>Employees by Position</i>	<i>View → Lists → Employees by Position</i>
<i>View Reports</i>	<i>Processes and Reports → View Reports</i>

Lesson 1 Exercise 2: Toolbar Icons, and Functions

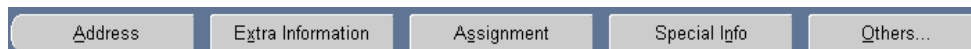
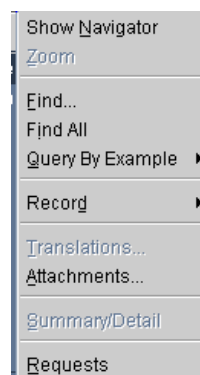
Purpose Test your understanding of some basic terms and functions associated with the DCPDS.

Directions Match each Function from the following list with its corresponding shortcut Key or illustration below. Write the item name next to its Function or illustration. The first one is done for you, as an example

- | | | |
|-------------------------|----------------------------|-----------------------------|
| • List of Values Button | • Save Button | • Query Menu |
| • Toolbar | • Drop Down Menu icon | • Message Line |
| • Navigation List | • Main Menu Bar | • Current Record Indicator |
| • List of Values Icon | • Taskflow Buttons | • List of Values |
| • Alternate region Tabs | • Attachment Button | • Date Track History |
| • Ctrl + F11 | New Record Button | • Alter Effective Date icon |
| • Delete | Find Button | • F4 |

File Edit View Folder Tools Window Help

Main Menu Bar



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Lesson 1 Exercise 2: Toolbar Icons, and Functions, Continued



Enter a query; press Ctrl+F11 to execute, F4 to cancel.

Record: 1/1 Enter-Qu... List of Valu... <OSC>



Agency Group

Find %

GP_ACCY_FLAG	Description
AB00	American Battle Monuments Commission (AB00)
AF01	Air Force Management Engineering Agency (AF01)
AF02	Air Force Inspection and Safety Center (AF02)
AF03	Air Force Operational Test and Evaluation Center (AF03)
AF04	Air Force Communications Agency (AF04)
AF05	Air Force Intelligence Service (AF05)
AF06	Air Force Audit Agency (AF06)
AF07	Air Force Office of Special Investigations (AF07)
AF08	Air Force Office of Security Police (AF08)
AF09	Air Force Personnel Center (AF09)
AF0B	U.S. Air Force Academy (AF0B)
AF0D	U.S. Air Forces, Europe (AF0D)
AF0I	Air Reserve Personnel Center (AF0I)
AF0J	Air Training Command (AF0J)
AF0K	Air University (AF0K)
AF0M	Headquarters, Air Force Reserve (AF0M)
AF0N	Immediate Office, Headquarters, USAF (AF0N)
AF0P	Pacific Air Force (AF0P)

Find OK Cancel

- + Req Personnel Action
 - + CAO/Transfer Request
 - + Mass Actions
 - Federal Position Description
 - Workflow Inbox
 - + Complaints Tracking
 - Breakdown Folder
 - Reduction In Force (RIF)
 - + Federal Maintenance Forms
 - + People
 - Person Summary
 - + FastPath
 - + Recruitment
 - PSEUDO SF50
 - + Career Management
 - Work Structures
 - Location
 - + Organization
 - + Job
 - Position
 - Description
 - Hierarchy

Lesson 1 Exercise 2: Toolbar Icons, Functions, Continued

Enter Query _____

Execute Query _____

Exit _____



Exercise 2: Terms and Tools (Answers)

Purpose Test your understanding of some basic terms and functions associated with the DCPDS.

ANSWERS

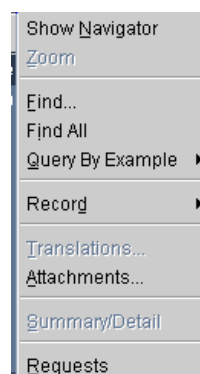
Main Menu Bar


 A horizontal menu bar with the following items: File, Edit, View, Folder, Tools, Window, Help.

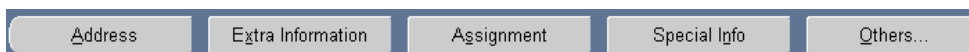
Toolbar



Query Menu



Taskflow button



Current Record indicator



Alternate Region Tabs



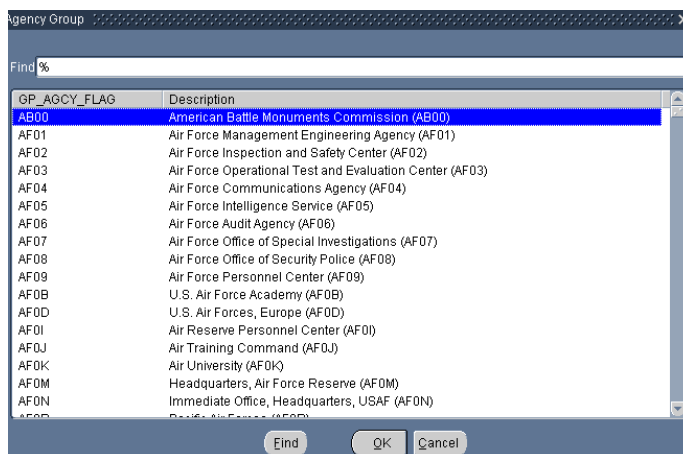
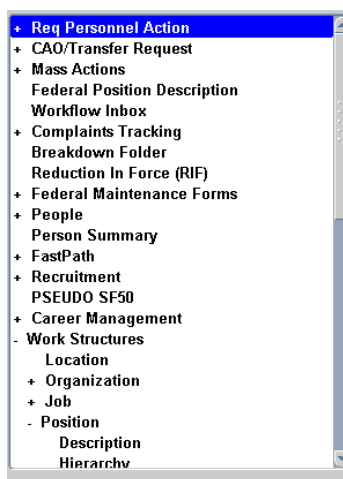
Message Line



Alter Effective Date



List of Values icon

Exercise 2: Terms and Tools (Answers), Continued**Save Button****Drop Down Menu Button****List of values****Navigation List****Enter Query****F11****Execute Query****Ctrl + F11****Exit****F4***Continued on next page*

Exercise 2: Terms and Tools (Answers), Continued



New Record Button



Find Button



Attachment Button



Delete Button



Date Track History

Lesson 1 Exercise 3: Using Date Tracking

Purpose	Practice using DateTracking
----------------	-----------------------------

- | | |
|-------------------|---|
| Directions | <ol style="list-style-type: none">1. From the Navigation List, select People → Enter Maintain The Find Person window will appear.2. Close the window.3. Invoke the Alter Effective Date window utilizing either the menu or icon method.4. From the Alter effective date window change date.5. Reset the date back to the current date. |
|-------------------|---|
-

Estimated Time	15 minutes
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Lesson 1 Exercise 4: Accessing On Line Help

Purpose Test your ability to understand how to accomplish search tasks using Oracle Applications Help functionality.

Directions Navigate to your on line help and perform a search on a topic of choice

Estimated Time 10 min

Lesson 1: Navigation in 11i, continued**Key discussion point(s)**

- The way information is dated or Date Tracked provides a powerful tool for maintaining a continuous history of information
- The navigation menu is based on the role you have selected. If you have been assigned more than one role the navigation menu will display based on the role you have selected.

**Questions?****NOTES**

Lesson 2: Other Functions of Oracle Application Windows

NOTES



This lesson will show you how to retrieve data, use folders, and export data.



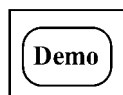
After this training, you will be able to:

- Execute a Query.
- Customize your folder views
- Create and customize a Folder.
- Keep your Folder private or public for others to access.
- Export data from your Folder.



Retrieving data will require you to perform a query. A query is a request to display records based on designated criteria.

A Folder is a special block in which the field and record layout can be customized. You can export data retrieved in a folder that can be viewed or manipulated in various applications, i.e., Excel or Word.




Turn to the Demo and observe while I:

- Use the Find Mode to retrieve data.
- Use the Query Mode to retrieve data.
- Open a folder and only display selected fields.
- Make a folder private or public for others to access.
- Export data from a folder.

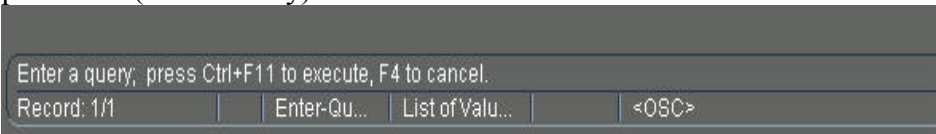
DEMO

Retrieving Data (Queries)

The Find Mode

Step	Action
1.	Select View > Find from the pull-down menu or select the Find icon with a flashlight  . Each Find form has fields relevant to your search. The Find form is not available in every form.
2	Enter your search criteria in the appropriate fields.
3	Click Find to find any matching records.

The Query Mode

Step	Action
1.	<p>Select View > Query by Example > Enter from the pull-down menu or press F11 (shortcut key).</p>  <p>The ENTER QUERY message will appear in the status bar in the bottom left corner of the screen.</p>
2	Enter search criteria in any of the fields, using wildcard and query operators. You can also select Show Last Criteria from the pull-down menu to display the search criteria in your last search.
3	Select View > Query by Example > Run or press Ctrl + F11 (shortcut key) to execute the search.



Continued on next page

Retrieving Data, Continued

Query Operators

Operators	Meaning	Example
=	Equal to	= 'Steve' or = 107
!=	Not Equal to	!= 'Steve' or != 107
>	Greater than	>99.1 or > 'Steve'
>=	Greater than or equal to	>= 55
<	Less than	<1000.00
<=	Less than or equal to	<= 100
#BETWEEN	Between two values	#BETWEEN1and 100

Query by Example

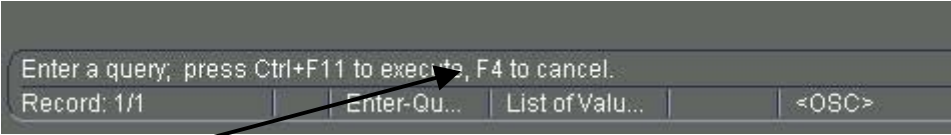
Step	Action
1.	Navigate to the form in which you would like to conduct your count.
2	Select View > Query by Example > Enter from the menu bar, or press F11, to activate the query mode.
3	The Enter a Query message will appear in the status bar in the lower left corner of the screen.
	NOTE: You must complete this step (activate query mode) before you can define any search criteria for your count.
4	Navigate to the field(s) where you wish to define search criteria for your query. Enter complete or partial values in these fields, to define the type of records that you wish to count.
	NOTE: In the above step, “partial” refers only to sets of values defined by wildcards, as described in the Wildcards section of this document. If you enter a partial value without a wildcard, Oracle will not give you an accurate count for the data set that you are requesting.

Continued on next page

Retrieving Data, Continued

Step	Action
5	<p>Choose Count Matching Records from the View > Query by Example menu on the menu bar. A message will appear on the status bar, informing you of the number of records that would be retrieved if you ran the query at this point. Once you see the number of records, you can do one of the following:</p> <ul style="list-style-type: none"> • Run the query by selecting View > Query by Example > Run from the menu bar or press Ctrl + F11. • If you only need to know the actual number of records or you do not wish to execute the query at this time, cancel query mode by pressing F4 on your keyboard or by selecting View > Query by Example > Cancel from the menu bar

Exiting out of Query mode

Step	Action
1	<p>Once you execute a query (View > Query by Example > Run) and Oracle retrieves the records that you have requested, the query mode will automatically cancel.</p> <ul style="list-style-type: none"> • If you enter a query and you wish to cancel it before it executes, press F4 on your keyboard or select View > Query by Example > Cancel from the menu bar. Oracle will return to its normal (input) mode.  <p>The “Enter a query” message will display any time a window is in query mode. This message provides you with the shortcut keys to execute your query or cancel.</p>


Folders Tools

Folders








Folder Tools are available in the Personnelists and Federal HR Manager roles.

- Display only those fields that are of interest to you.
- Instantly modify the width, sequence, and prompts of the fields you want to display.
- Display a subset of records based on your specific criteria.
- Display records in a specific order.
- Save your folder customizations for later use.
- Automatically query for a subset of records each time you open a specific folder.
- Keep your folder customizations private or make them public for others to access.
- Make your customizations the default layout for a folder block.

Folder Tools






When you navigate to a folder block, the **Folder Tools** button gets enabled on the toolbar. Choose this button  to display the folder tools palette on your screen.

The folder tools include the following buttons that replicate the actions of some commonly used Folder menu items:

Buttons	Function
 Open Folder	Open another folder.
 Save Folder	Save the current folder.
 Create New Folder	Create a new folder
 Delete Folder	Delete an existing folder
 Widen Field	Increase the width of a field
 Shrink Field	Decrease the width of a field
 Show Field	Show a currently un displayed field

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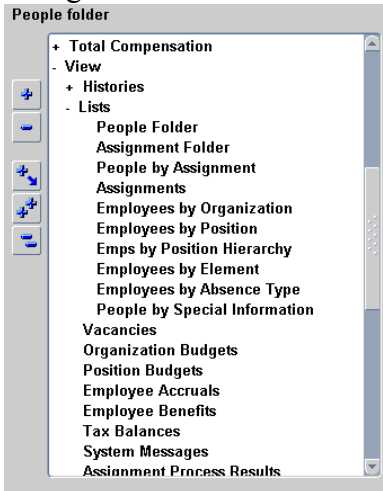
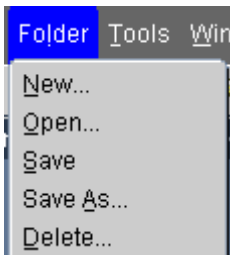
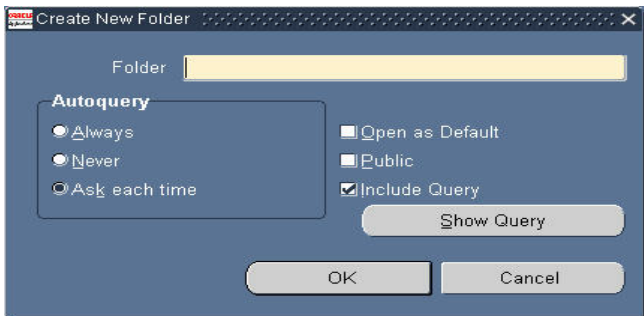
Folders Tools Tools, Continued

Buttons	Function
 Hide Field	Hide a currently displayed field.
 Move Left	Swap the current field with the field to its left in a multi-record block. In a single-record block, move the current field one character width to the left
 Move Right	Swap the current field with the field to its right in a multi-record block. In a single-record block, move the current field one character width to the right
 Move Up	Move the current field up by one character height for a single-record display
 Move Down	Move the current field down by one character height for a single-record display

Continued on next page

Creating a Folder

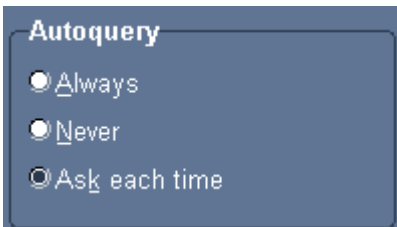
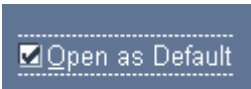

Folder Window

Step	Action
1	<p>Navigation Path → View → List → People Folder</p>  <p>NOTE: Any window listed under View → List is a folder window and the following procedures apply to all.</p>
2	<p>Select Folder > New. You will see a Create New Folder window.</p> 
3	<p>The create New Folder window opens: Enter a new and unique folder name.</p> 

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Creating a Folder, Continued

Folder Window

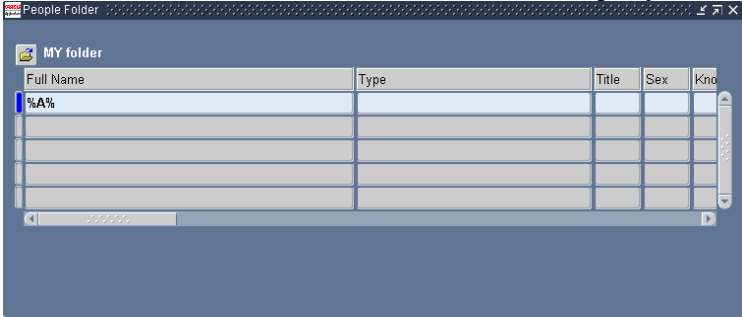
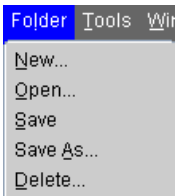
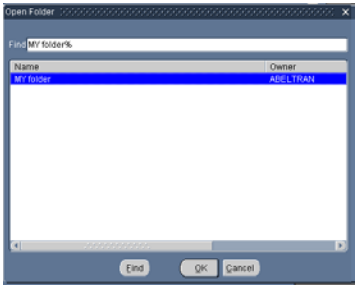
Step	Action
4	<p>Select the Autoquery option you require.</p>  <p>NOTE: You must be very careful in assigning the Autoquery option. The basic rule is that the folder should behave the same as the standard screen. If, when you enter the standard screen, data is automatically displayed, set the Autoquery option to “Always”; if it is not, set the option to “Never.”</p>
5	<p>Check Open as Default if you want this folder definition to open as your default every time you invoke the form.</p> 
6	<p>Check Public if you want other users to have access to this folder.</p> 
7	Click the <OK> button when you are finished

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Creating a Folder, Continued

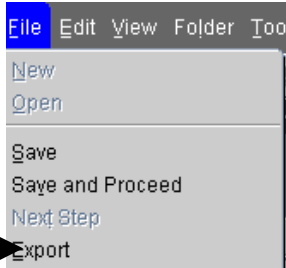
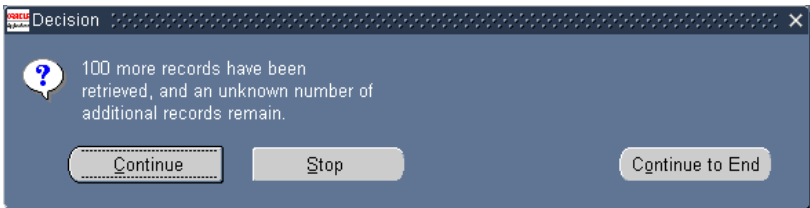
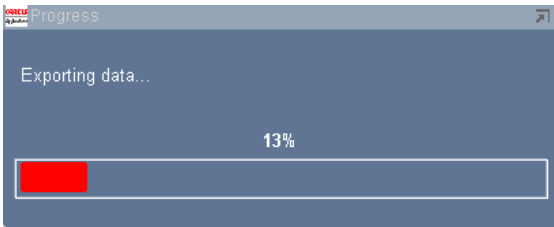
Defining Folder Query Criteria

One advantage of a folder is that you can customize it to display only the records you want to see. You can easily define and alter the query criteria for any folder and save those criteria in a folder definition

Step	Action
8	<p>Initial query mode by Pressing the F11 key, Enter the Search Criteria and press CTRL and F11 buttons. At least one record has to be retrieved for the folder to memorize the query.</p> 
9	<p>After the query has completed click Folder > Save. This query is saved in a folder definition</p> 
10	<p>Verify this folder has been saved with the parameters you have selected. Click <Folder> <Open>. The open folder window will appear with the Name of the folder and creator.</p> 
11	<p>You can query your folder in this window with the specific parameters given. And if you choose you can reset the query criteria by selecting Folder > Reset Query</p>

Exporting Data

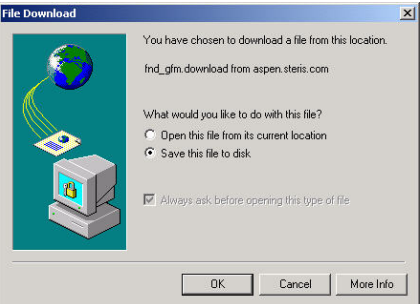
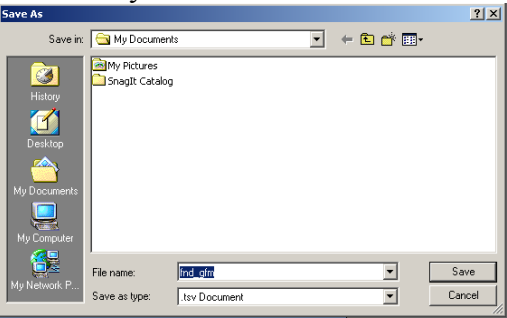
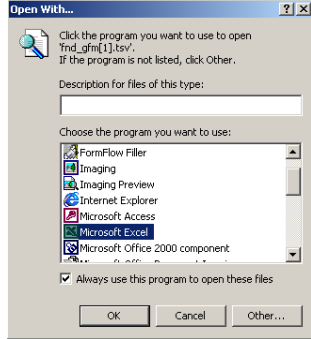
Exporting Data You can export Data from any of your Views (Folder windows)

Step	Action
1	<p>Before beginning, you must execute a query or open a Folder with the data you would like to export. From the main menu Click <File> <Export>.</p> 
2	<p>If there are several hundred records to be retrieved a Decision box will appear click the <Continue> button.</p>  <p>NOTE: This will occur after every 100 records, to avoid having to click the continue button several time, Click the <Continue to End> button to expedite query.</p>
3	<p>A Progress box will appear showing the percentage of data being exported.</p> 

Continued on next page

Exporting Data, Continued

Exporting Data

Step	Action
4	<p>After the export is complete a File Download window will open. You have a choice of Save the File to disk or Open this file from the current location. Click the <OK> button once you have made a selection.</p> 
5	<p>If you select “Save this file to disk” you will be allowed to save the file to your area of choice.</p> 
6	<p>If you select the option to open the file, the Program window will appear: Highlight <u>EXCEL</u> and click the<OK> button.</p>  <p>The data you exported will now be imported to an excel spreadsheet; you can save the file with an XLS extension to the directory of your choice.</p> <p>NOTE: The file will download as a text delimited. Change the file type before saving the file to your directory.</p>

Lesson 2: Other Functions of Oracle Application Window, continued



Begin the following exercises:

- Exercise 1 – Query's (Retrieving Data)
- Exercise 2 – Folder Tools and Creating a Folder
- Exercise 3 – Exporting Data

Approximately 25 minutes

NOTES

Lesson 2 Exercise 1: Query's (Retrieving Data)

Purpose

Practice the querying for retrieving records so you will be able to complete other related actions:

Directions

1. From the Navigate list select **View → List → Assignment Folder**. The Assignment Folder window will open.
2. In the Assignment Folder window: Use one of the Query methods
 - a) Click the “Both” radial button.
 - b) Press the [F11] button on the keyboard or from the Main menu click<View> <Query by Example><Enter>
 - c) Enter a query in the *Full Name* data field (e.g., A%)
 - d) Press the **Ctrl + [F11]** button on the keyboard or Click <View> <Query by Example><Run> to execute the query
 - e) The current record indicator will be on first record in the list, you can select another record if you choose.

***NOTE:** Refer back to Demo for detailed steps*

Estimated Time 10 min

Lesson 2 Exercise 2: Folder Tools and Creating a Folder

Purpose Practice creating a folder and customizing the display of data in the folders:

Directions

3. Navigation path select **View → List → People Folder**. The People Folder window will open.
4. Create your own unique folder.
5. In the People Folder window perform one of the Query methods as in Lesson 2 Exercise 1.
6. Open your folder tools
7. Move the folder columns from right to left.
8. Widen and shrink the folder columns.

***NOTE:** Refer back to Demo for detailed steps*

Estimated Time 15 min

Lesson 2 Exercise 3: Exporting Data

Purpose Practice exporting data from a folder and importing to an Excel spreadsheet:

Directions

9. Navigation path select **View → List → People Folder**. The People Folder window will open.
10. In the People Folder window perform one of the Query methods as in Lesson 2 Exercise 1.
11. After the query has retrieved the data.
12. Export it for viewing.

***NOTE:** Refer back to Demo for detailed steps*

Estimated Time 15 min

Lesson 2: Other Functions of Oracle Application Windows, continued



Key discussion point(s)

- Limitations of criteria used to retrieve data using the Find Mode. There are generally less fields (criteria) to query on. In addition, the Find Mode is not accessible in all the windows.
- The Query Mode is more efficient when you have exact matching data.
- The steps to executing a Query will apply to any Oracle Application form. Oracle will retrieve data based on the criteria that you entered. You will learn two ways to create queries, Find Mode and Query Mode.
- Folder Tools are available in the Personnelists and Federal HR Manger roles.
- Brainstorm various uses for the Folders.

Review the objectives



Questions?

Lesson 3: The Position Window

NOTES



This lesson will introduce you to the Position Window and new functionality in Oracle 11i. This lesson will provide a quick hands-on exercise before we begin the lesson Copying a Position.

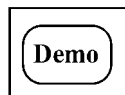


After this training, you will be able to:

- Navigate to the Positions Window.
- Use the Date Track function to view history.
- Use Task Flow Buttons to view other windows.



The position window is the beginning window for most position actions. Review fields, buttons, Extra Information Types, and Flex Fields.



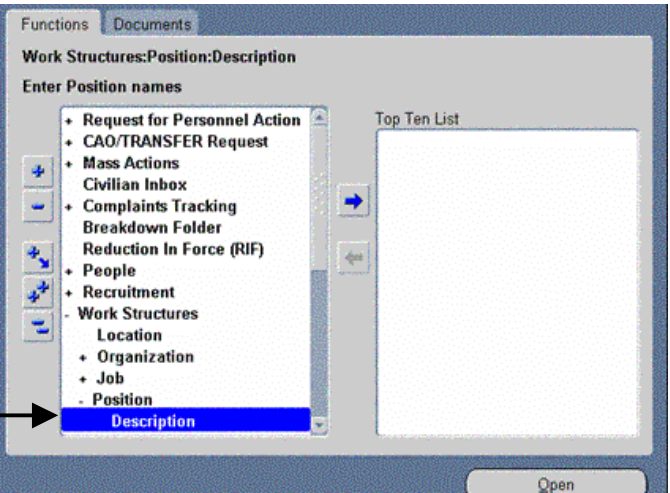
Turn to the Demo and observe while I:

- Navigate to the Position Window.
- Use the Find Mode to retrieve a position.
- Review fields, Tabs, and Task Flow Buttons.


DEMO

The Position Window

Accessing the Position Window

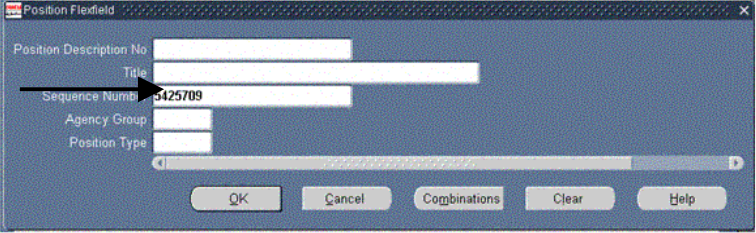
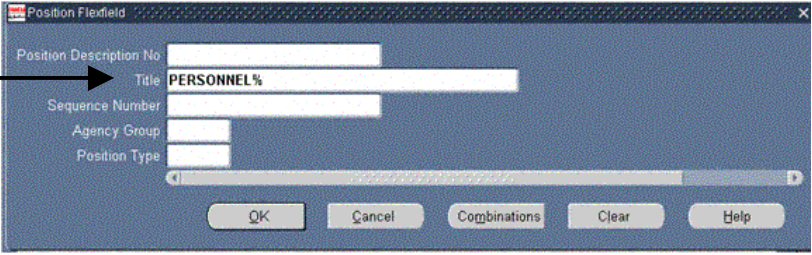
Step	Action
1	<p>Navigation Path: Work Structure → Position → Description → Open Button.</p> 

Find the Position

Step	Action
2	<p>The Find Positions window displays.</p>  <p>This window is a new feature that provides an easy method to retrieve a blank Position window for building a new position, and for querying current positions in the database.</p> <ul style="list-style-type: none"> You can query on any of the data fields associated with the Name (now Date Effective Name) data fields. You can use the Sequence Number. <p>You don't have to use the periods to separate data, i.e. “.”“PERSONNEL%” is now just “PERSONNEL%.”</p>

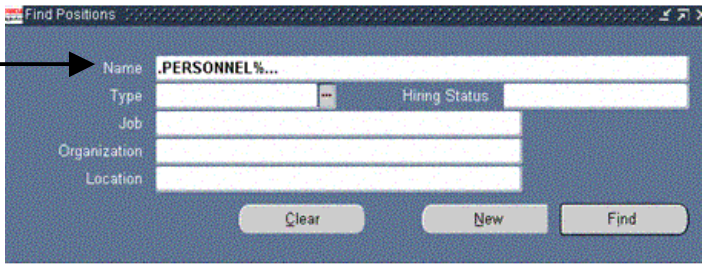
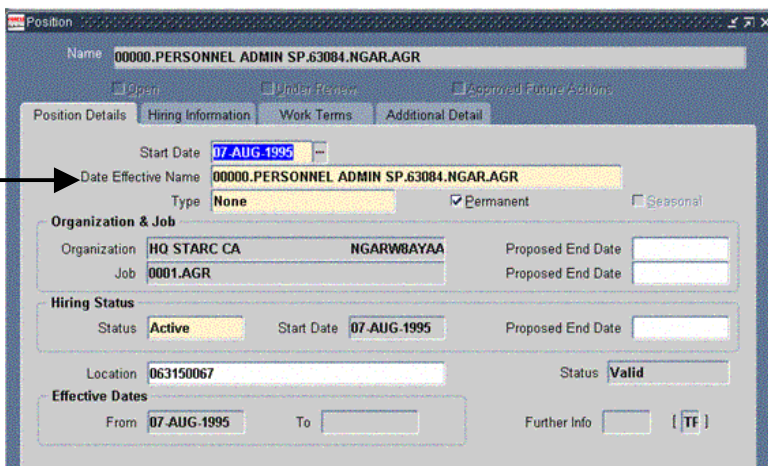
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The The Position Window, Continued

Step	Action
3	<p>On the Find Positions window, click in the name data field. All fields should be blank before entering your query. A query can be performed in any of the data fields.</p>  <p><i>Note:</i> <u>Do not</u> click the <Find> button without entering data in one of the fields. It causes a lengthy delay while the system searches the entire position data base.</p>
4	<p>Enter search criteria in an appropriate field followed by a % sign. For example, in the Title data field, enter “PERSONNEL%,” to retrieve all positions with “PERSONNEL” in the Title.</p>  <p>NOTE: The fields are case sensitive. If the Title was built with all caps, you must use all caps when entering the Title information.</p>

Continued on next page

The The Position Window, Continued

Step	Action
5	<p>Click the <OK> button. The Find Positions window opens with the info in the <i>Name</i> data field:</p> 
6	<p>Click the <Find> button. The Position Window opens with the first position that matches your criteria:</p>  <p>The message bar at the bottom of the window displays “Record: 1/?” indicating there is more than one record. Use the Up and Down Keys to search for the position you need.</p>

Building a New Position

Step	Action
1	<p>If you need to build a new position,</p> <ol style="list-style-type: none"> 1. Click the <New> button. The Position Window opens. 2. Enter the information in the Position details tabs and the Others button. 3. Validate and Save.

Continued on next page

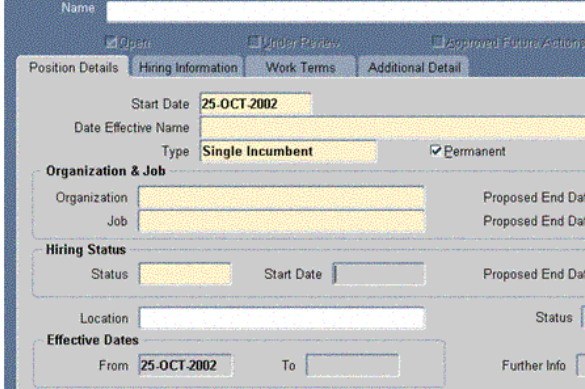
The The Position Window, Continued

Querying a Current Position

Step	Action
1	<p>If you need to view a current position, or make changes to a current position, you can use the usual query method:</p> <ol style="list-style-type: none"> 1. Close the Find Positions window. The Position Details window opens. 2. Press F11 key (prior to clicking anywhere on the form), to query the position. 3. Enter the name of the position in the <i>Date Effective Name</i> data field, for example: “.PERSONNEL%”. 4. Press Ctrl and F11 keys simultaneously. The first position with the query criteria displays. 5. Scroll to the position using the Up and Down Keys. When the desired Position window displays, make the changes on the appropriate tabs. 6. Validate and Save.

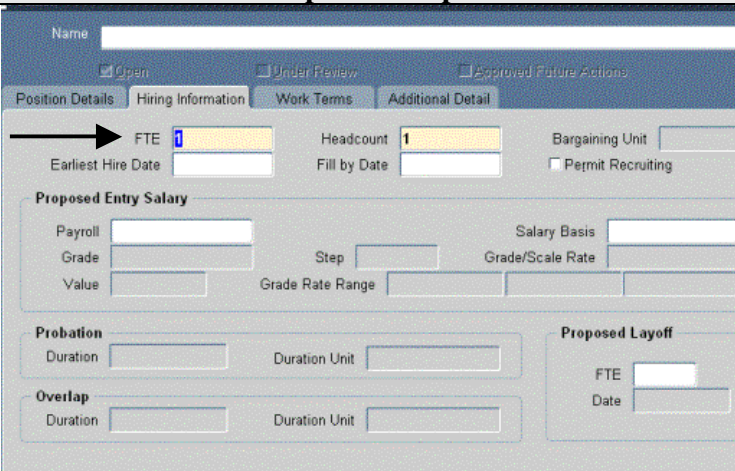
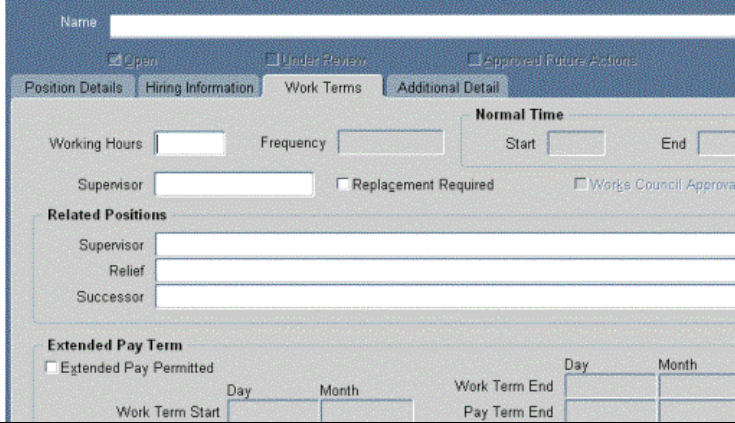
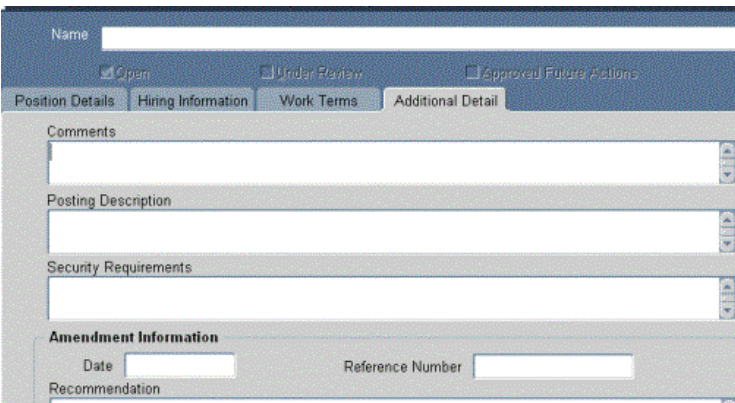
Position	Window	Description
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	6
7	7	7
8	8	8
9	9	9
10	10	10
11	11	11
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93	93	93
94	94	94
95	95	95
96	96	96
97	97	97
98	98	98
99	99	99
100	100	100

The **Position Window** opens with the **Position Details** Tab open. Click on the other three tabs to display: **Hiring Information**, **Work Terms**, and **Additional Detail**, which are not being used by components at this time.

Tab	Example/Description
<p data-bbox="519 1316 667 1455">Position Details</p> <p data-bbox="519 1455 667 1724"><i>Proposed End Dates</i> are Optional</p>	

Continued on next page

The The Position Window, Continued

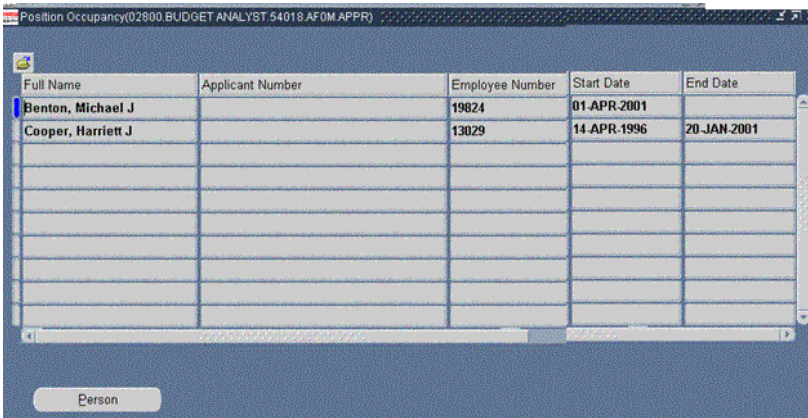
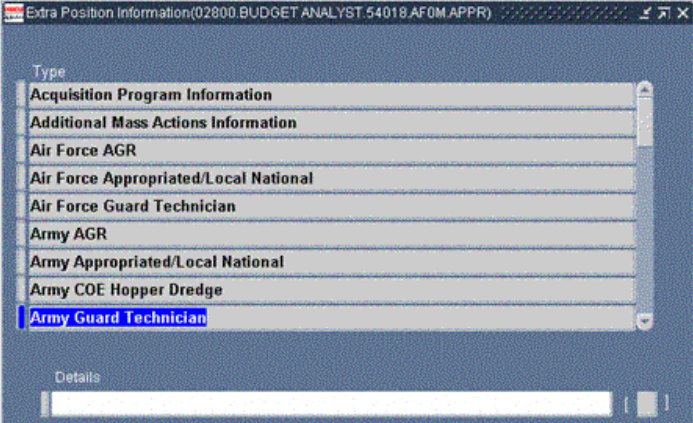
Tab	Example/Description
Hiring Information (Full Time Equivalent)	
Work Terms	
Additional Detail	

Continued on next page

The The Position Window, Continued

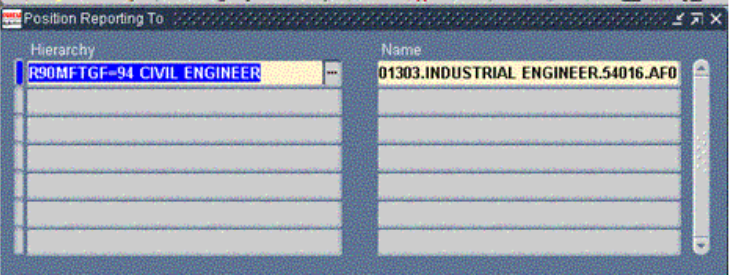
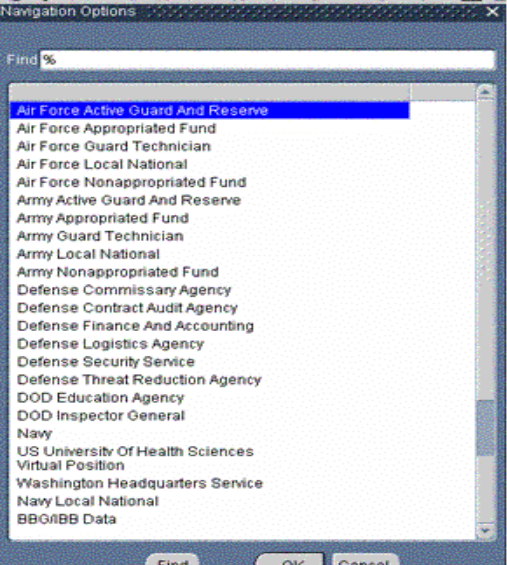
Taskflow Buttons

There are five taskflow buttons on the Position Window:

Taskflow Button	Example/Description
<Validate>	When you click the Validate taskflow button, the system performs the necessary edit checks and updates the database with the new information.
<Occupancy>	<p>Displays the employees who have occupied the position, plus their start and end dates.</p>  <p>If you want to view the employee's record, you can highlight the name and click the <Person> button at the bottom of the window.</p>
<Extra Information>	

Continued on next page

The The Position Window, Continued

Taskflow Button	Example/Description
<Extra Information> (Cont)	<ul style="list-style-type: none"> The fields include the data items required to pass the Central Personnel Data File (CPDF) edits, as well as optional position data items required by each component. The system supplies values from the data base for those data items completed earlier in the position build or by direct data entry. To view or enter Extra Information data, highlight the Type of information and click in the Details Field.
<Reporting To>	<p>This button displays the Hierarchy and Position Name information.</p> 
<Others>	

Lesson 3: The Position Window, continued



Begin the Following Exercise:

- Exercise 1 – Query a Position

Approximately 10 minutes

NOTES

Lesson 3 Exercise 1: Querying within the Position Window

Purpose Practice the querying options for retrieving position records so you will be able to complete other position-related actions:

- **Quick copy** a position
 - **Validate** a position
 - **Change** position data
-

Directions **Find** the Position Window and **Query** a position. Navigate through the form and complete the following questions.

1. Navigation Path: **Work Structure** → **Position** → **Description**, double click on Description.
2. In the Find Positions window locate a position.

Complete the following questions:

a. Name of Position you queried? _____

b. Which method did you use to find a position?

Circle One Find Mode or Query Mode

c. List one employee that has or is currently occupying the position?

NOTE: Refer back to the DEMO for detailed steps.

Estimated Time 10 min

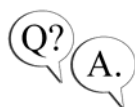
Lesson 3: The Position Window, continued



Key discussion point(s)

- Query and Find Mode options can be used to retrieve a position.
- Position Window is Date Tracked, viewing past changes.
- Updatable data fields are yellow and white, gray fields are not used by DoD.
- When you delete a position, the sequence numbers are recycled and are used again.
- Position Type in the Position Details Tab defaults to Single Incumbent.

Review the objectives



Questions?

NOTES

Lesson 4: Accessing the People & Person Summary Window



This lesson will introduce you to the People and Person Summary Window. These Windows store information such as education, licenses, and basic geographical information.

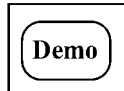


After this training, you will be able to:

- Navigate to the People Window.
- Locate information stored in the Tabs or Taskflow Buttons.
- Use the Person Summary Window to view data stored in Tabs or Taskflow Buttons in one place.



The People Window is the beginning window to create a persons record. This Window stores critical information that you need to run your business processes.



Turn to the Demo and observe while I:

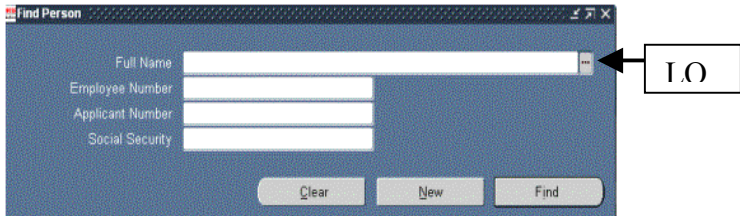
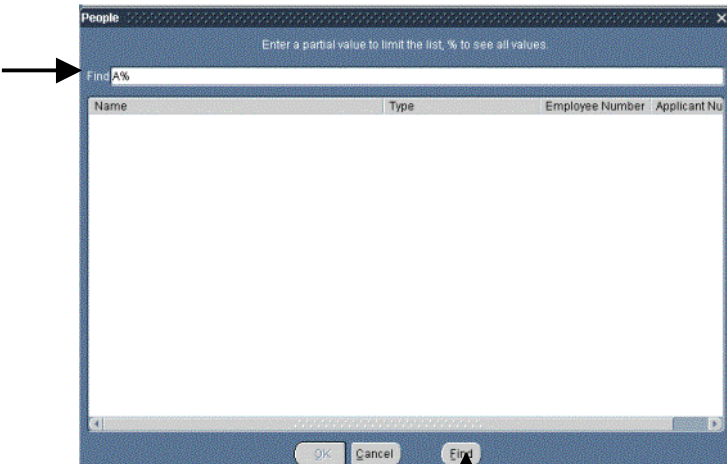
- Navigate to the People Window.
- Use the Find Mode to retrieve a person.
- Review fields, Tabs, and Task Flow Buttons.

NOTES

DEMO

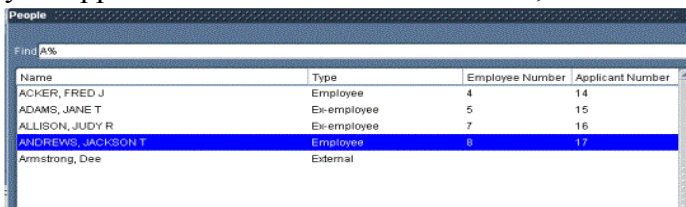
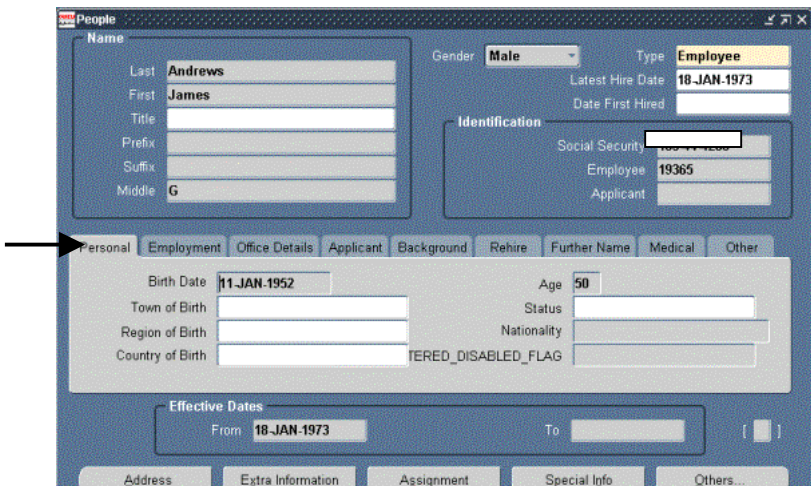
People Window

Accessing the People Window

Step	Action
1	<p>Navigation Path → People → Enter and Maintain. The Find Person window displays:</p> 
2	If you are building an applicant, click the <New> button. The People window displays. Complete the data fields.
3	If you need to make a change to an employee record or view the information in the Person Summary , click the LOV at the end of the Full Name data field on the Find Person Window.
4	<p>The People –Find window displays.</p> <ul style="list-style-type: none"> • Enter a % sign to view all the names in the data base, or • Enter the first letter of the last name with a % sign. For example: “A%” displays all last names starting with an “A.”  <p>Click the <Find> button</p>

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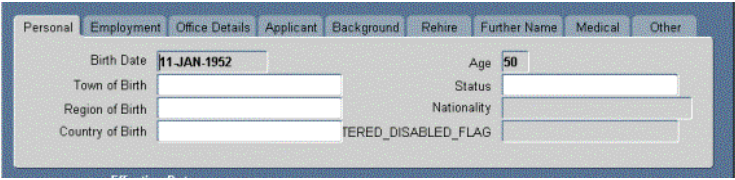
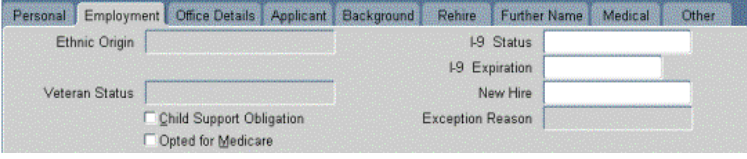
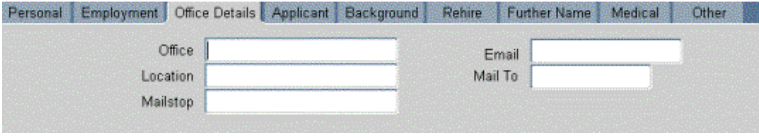
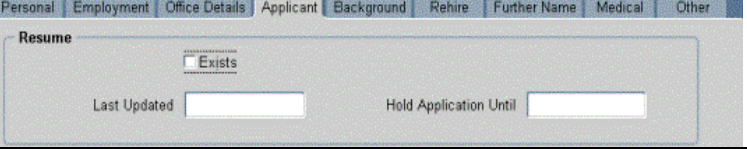
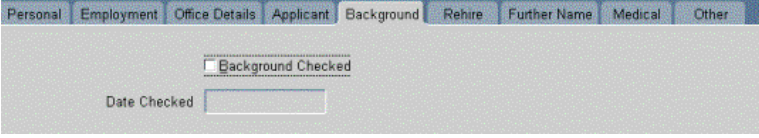
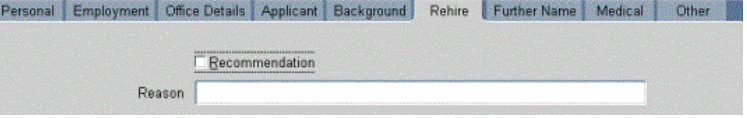
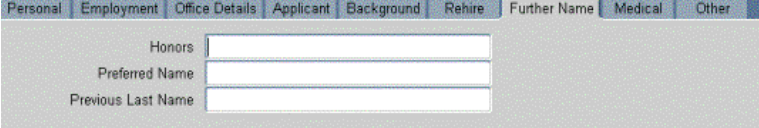
People Window, Continued

Step	Action
5	<p>The People – Find Window displays with a list of names and Employee/Applicant Numbers. Select the name, and click <OK>.</p> 
6	<p>The People window displays the data fields automatically populated. There are nine tabs and five taskflow buttons. The Personal Tab displays first.</p> 

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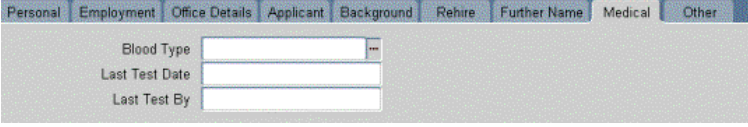
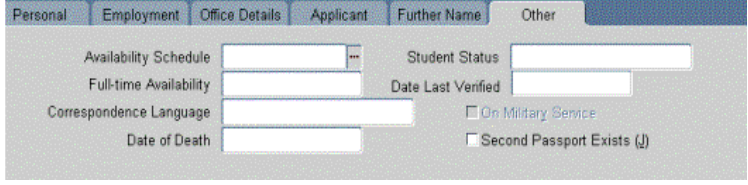
People Window, Continued

People Window Description

Tab	Example/Description
Personal	
Employment:	
Office Details	
Applicant	
Background	
Rehire	
Further Name	

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People Window, Continued

Tab	Example/Description
Medical	
Other	

People Window Taskflow Buttons

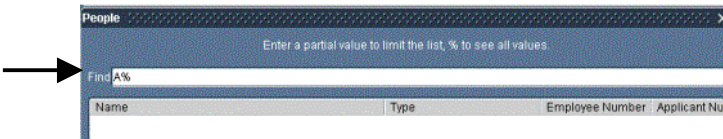
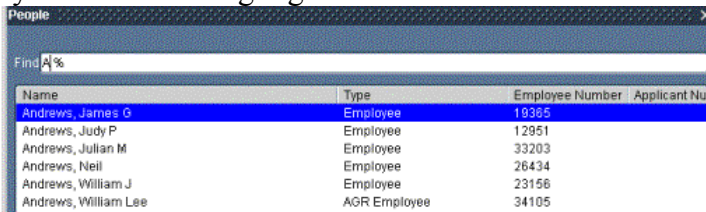
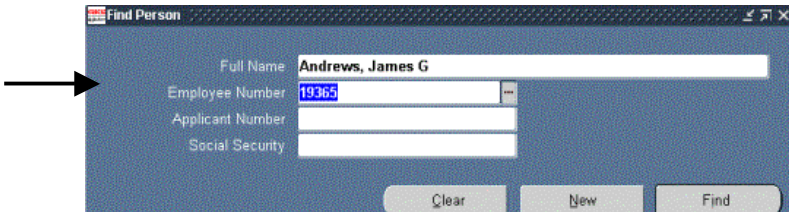
The **People** Window has five Taskflow Buttons:

- **Address**
- **Extra Information**
- **Assignment** (has six tabs)
- **Special Information**
- **Others** (with **Navigation Options** including the **Person Summary**)

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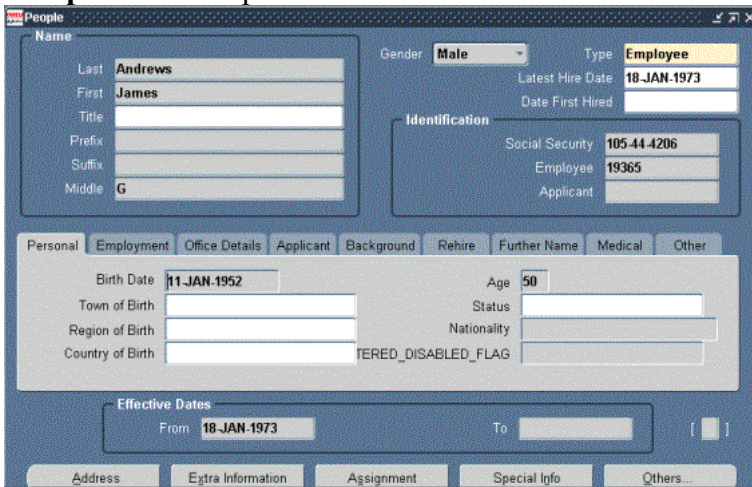
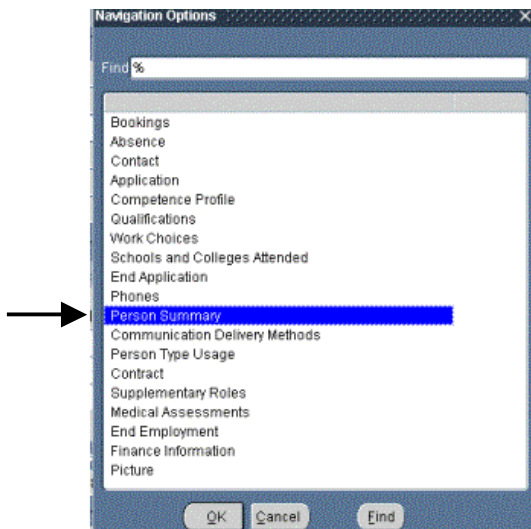
Person Summary

Accessing the Person Summary

Step	Action
1	Navigation Path → People → Enter and Maintain. The Find Person Window displays. (For examples, refer to Accessing the People Window in this guide.)
2	Click the LOV at the end of the Full Name data field.
3	<p>The People –Find Window displays.</p> <ul style="list-style-type: none"> Enter a % sign to view all the names in the data base, or Enter the first letter of the last name with a % sign. For example: “A%” displays all last names starting with an “A.”  <p>Click the <Find> button</p>
4	<p>The People – Find window opens with list of names and Employee Numbers. Highlight the name and click <OK>.</p> 
5	<p>The Find Person window displays the Employee Name, and Number:</p>  <p>Click the <Find> button.</p>

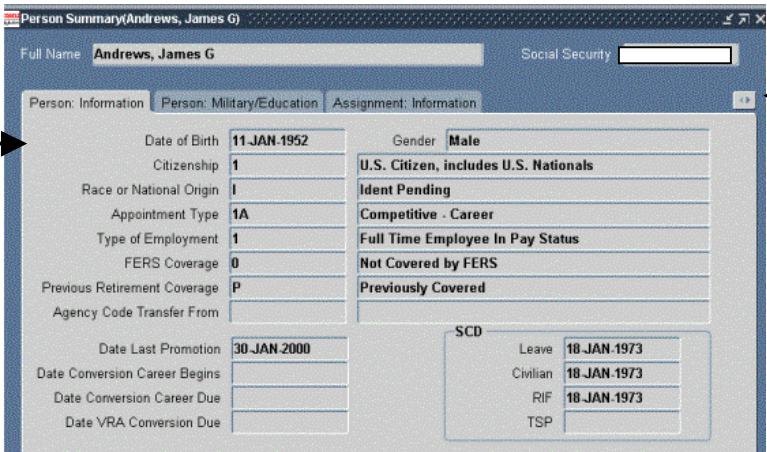
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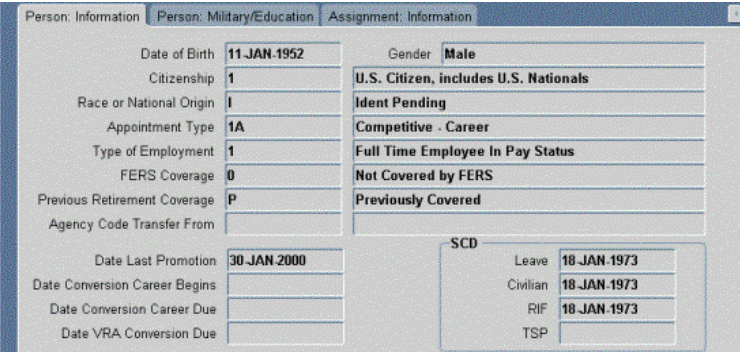
Person Summary, Continued

Step	Action
6	<p>The People window opens:</p>  <p>The screenshot shows the 'People' window with tabs for Personal, Employment, Office Details, Applicant, Background, Rehire, Further Name, Medical, and Other. The 'Personal' tab is active, displaying fields for Name (Last: Andrews, First: James, Middle: G), Gender (Male), Type (Employee), Latest Hire Date (18-JAN-1973), Date First Hired, Social Security (105-44-4206), Employee ID (19365), and Applicant. Below these are fields for Birth Date (11-JAN-1952), Age (50), Town of Birth, Region of Birth, Country of Birth, Status, Nationality, and a checkbox for TERCED_DISABLED_FLAG. At the bottom, there are 'Effective Dates' (From: 18-JAN-1973, To:) and a row of buttons: Address, Extra Information, Assignment, Special Info, and Others... An arrow points to the 'Others...' button.</p>
7	<p>Click the <Others> button. The Navigation Options window opens:</p>  <p>The screenshot shows the 'Navigation Options' window with a search bar 'Find %' and a list of options. 'Person Summary' is highlighted in blue. Other options include Bookings, Absence, Contact, Application, Competence Profile, Qualifications, Work Choices, Schools and Colleges Attended, End Application, Phones, Communication Delivery Methods, Person Type Usage, Contract, Supplementary Roles, Medical Assessments, End Employment, Finance Information, and Picture. At the bottom are buttons for OK, Cancel, and Find. An arrow points to the 'Person Summary' option.</p>
8	<p>Select Person Summary and click the <OK> button.</p>

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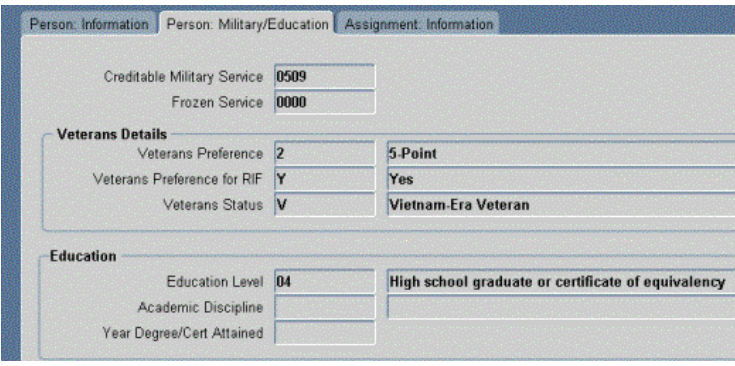
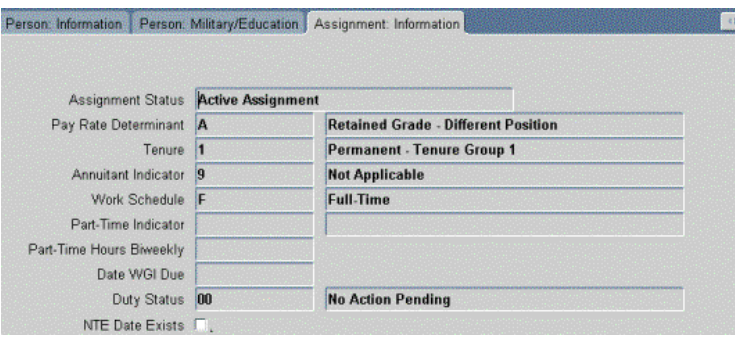
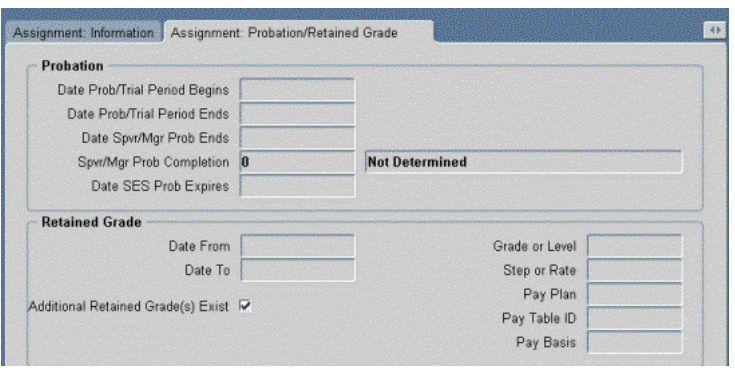
Person Summary, Continued

Step	Action
9	<p>The Person Summary window contains 12 tabs. The form will only display a few at a time. To view additional tabs click the arrows to the right of the tab headings:</p> 

Tab	Example/Description
Person Information	

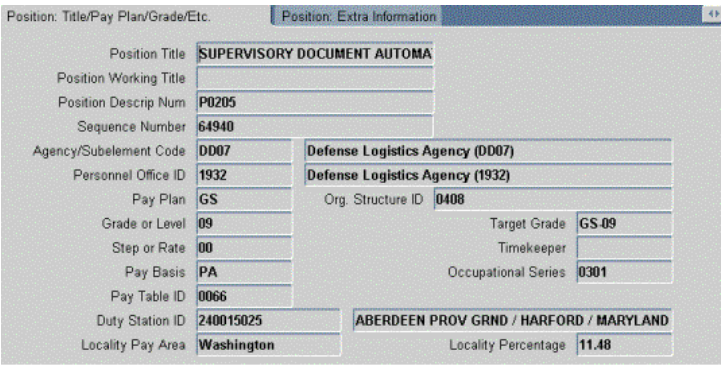
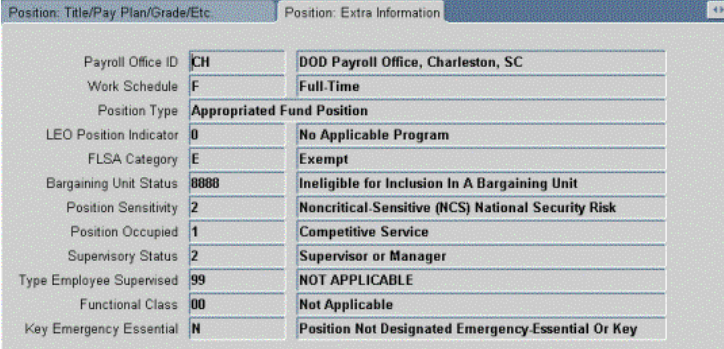
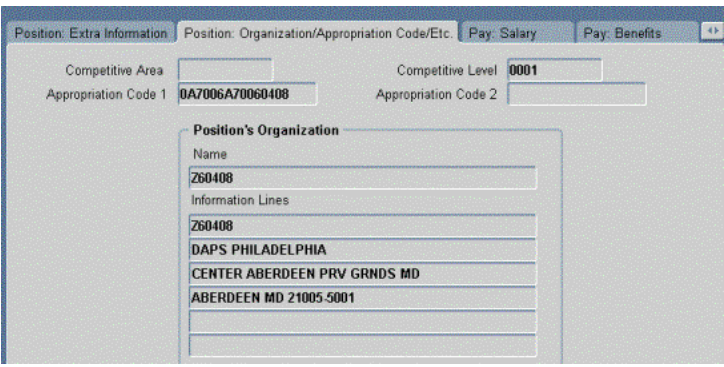
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Person Summary, Continued

Tab	Example/Description
Person Military/ Education	
Assignment Information	
Assignment Probation/ Retained Grade	

Continued on next page

Person Summary, Continued

Tab	Example/Description
Position: Title/Pay Prev/Grade, Etc.	
Position: Extra Information	
Position: Organization/ Appropriation Code/Etc.:	

Continued on next page

Person Summary, Continued

Tab	Example/Description																								
Pay Salary	<p>Position: Extra Information Position: Organization/Appropriation Code/Etc. Pay: Salary Pay: Benefits</p> <p>Effective Date</p> <p>Basic Pay 39,043.00 13-JAN-2002</p> <p>Locality Pay 4,482.00 13-JAN-2002</p> <p>Adjusted Basic Pay 43,525.00 13-JAN-2002</p> <p>Other Pay 0.00 18-JUN-2000</p> <p>AUO</p> <p>Availability Pay</p> <p>Retention Allowance</p> <p>Staffing Differential</p> <p>Supervisory Differential</p> <p>Total Pay 43,525.00 13-JAN-2002</p> <p>EDP Type</p> <p>Hazard Type</p>																								
Pay Benefits	<p>Position: Organization/Appropriation Code/Etc. Pay: Salary Pay: Benefits Performance</p> <p>Retirement Plan 1 CSRS Effective Date 18-JUN-2000</p> <p>FEGLI D0 Basic • Option A Effective Date 18-JUN-2000</p> <p>Health Benefits</p> <p>Plan 45 Mail Handlers-Std (45) Effective Date 18-JUN-2000</p> <p>Enrollment 2 High Option Self and Family (2) Effective Date 18-JUN-2000</p> <p>Thrift Savings Plan</p> <p>Amount Effective Date 01-JUL-2001</p> <p>Rate Status E Eligible To Contribute</p> <p>G Fund Status Date 12-APR-1987</p> <p>F Fund Eligibility Date</p> <p>C Fund</p>																								
Performance	<p>Position: Organization/Appropriation Code/Etc. Pay: Salary Pay: Benefits Performance</p> <p>Appraisal Type A Annual Appraisal</p> <p>Rating of Record 3 Acceptable, Fully Successful, Pass, Sat, Successful, Succ</p> <p>Date Effective 02-JAN-2000</p>																								
Awards/Bonus	<p>Pay: Benefits Performance Awards/Bonus Notification of Personnel Actions</p> <p>Awards</p> <table border="1"> <thead> <tr> <th>Type</th><th>Date Award Earned</th><th>Amount</th></tr> </thead> <tbody> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> </tbody> </table> <p>Relocation Bonus</p> <table border="1"> <thead> <tr> <th>Effective Date</th><th>Amount</th></tr> </thead> <tbody> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </tbody> </table> <p>Recruitment Bonus</p> <table border="1"> <thead> <tr> <th>Effective Date</th><th>Amount</th></tr> </thead> <tbody> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </tbody> </table>	Type	Date Award Earned	Amount										Effective Date	Amount					Effective Date	Amount				
Type	Date Award Earned	Amount																							
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Person Summary, Continued

Tab	Example/Description																																																																																						
Notification of Personnel Actions	<table><tr><th colspan="2">Pay: Benefits</th><th colspan="2">Performance</th><th colspan="2">Awards/Bonus</th><th colspan="2">Notification of Personnel Actions</th></tr><tr><th colspan="4">First NOA</th><th colspan="4">Second NOA</th></tr><tr><th>Code</th><th>Description</th><th>Code</th><th>Description</th><th>Effective Date</th><th colspan="2">Updated HR</th></tr><tr><td>702</td><td>Promotion</td><td></td><td></td><td>02.OCT.2001</td><td colspan="2">05.OCT.2001</td></tr><tr><td>100</td><td>Career Appointment</td><td></td><td></td><td>01.OCT.2001</td><td colspan="2">05.OCT.2001</td></tr><tr><td></td><td></td><td></td><td></td><td></td><td colspan="2"></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td colspan="2"></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td colspan="2"></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td colspan="2"></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td colspan="2"></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td colspan="2"></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td colspan="2"></td></tr></table>	Pay: Benefits		Performance		Awards/Bonus		Notification of Personnel Actions		First NOA				Second NOA				Code	Description	Code	Description	Effective Date	Updated HR		702	Promotion			02.OCT.2001	05.OCT.2001		100	Career Appointment			01.OCT.2001	05.OCT.2001																																																		
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	100	Career Appointment			01.OCT.2001	05.OCT.2001																																																																																	

Lesson 4: Accessing the People & Person Summary Window, continued



Begin the following exercises:

- Exercise 1 – Accessing the People Window
- Exercise 2 – Accessing the Person Summary Window

Approximately 15 minutes

NOTES

Lesson 4 Exercise 1: Accessing the People Window

Purpose

Practice retrieving records and navigating in the People Window so you will know where to locate key information. This exercise is also a practice for the first part of the next exercise.

Directions

Find the People Window and **Query** a person. Navigate through the form and complete the following questions.

3. **Navigation Path → People → Enter and Maintain.** The **Find Person** window displays.
4. In the Find Person window locate a person. .

Complete the following questions:

- d. What is the person's employee number?

- e. Does the person have an I-9 Status?

- f. What tab did you locate the I-9 Status on?

NOTE: Refer back to DEMO for detailed steps.

Estimated Time 10 min

Lesson 4 Exercise 2: Accessing the Person Summary window

Purpose

Practice using the Person Summary Window to access key information in one window.

Directions

Find the People Window and **Query** a person. Navigate through the form and complete the following questions.

5. **Navigation Path → People → Enter and Maintain.** The **Find Person** window displays.
6. In the Find Person window locate a person.
7. Click the **<Others>** button and select Person Summary.

Complete the following questions:

- g. What is the person's Work Schedule located on the Position Extra Information Tab?

- h. What is the current Position Title for the person you selected?

- i. What tab did you locate the Position Title on?

- j. Does the person you selected have any Awards?

NOTE: Refer back to DEMO for detailed steps.

Estimated Time 10 min

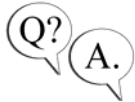
Lesson 4: Accessing the People & Person Summary Window, continued



Key discussion point(s)

- Query and Find Mode options can be used to retrieve a person.
- People Window is Date Tracked, viewing past changes.
- Data maintained in various Tabs and Buttons.
- Easy access to information stored in various areas in the People Form in one easy to view window.

Review the objectives



Questions?

NOTES

Lesson 5: Copying a Position

NOTES



This lesson will show you how to copy an existing position to create a new one. Position Copy reduces the time and effort required to create positions and ensures accurate data.



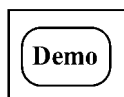
After this training, you will be able to:

- Specify criteria for finding and selecting positions.
- Use existing positions to create new ones making minor or major changes to the position definition.
- Copy a specific position or retrieve all positions that correspond to the criteria.
- Preview the results before creating the final copies.
- Save the set of positions (unlimited) and continue working on it at another time, i.e., when you have received all the information required to complete the position definitions.



Position Copy is one of the features of a windows-based system, much like copying and pasting. There are only two windows required.

The position copied must be in a Valid Status.



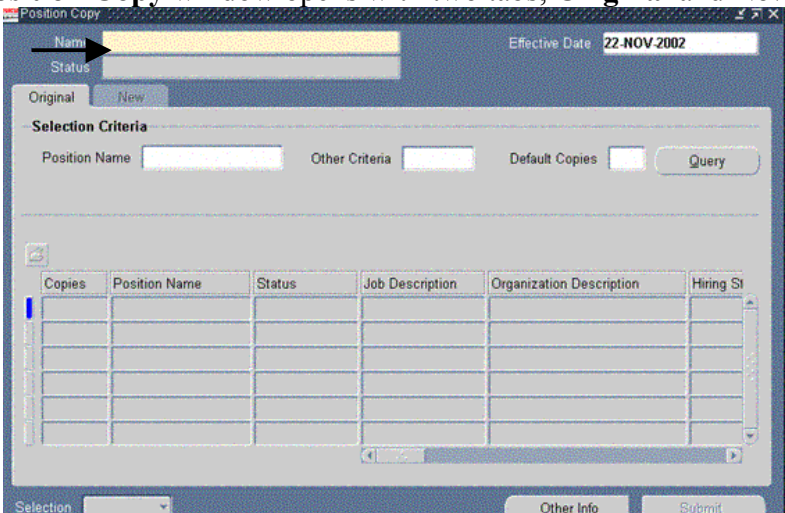
Turn to the Demo and observe while I:

- Copy a position
- Use three methods of retrieving
- Validating the copied positions

DEMO

Copying a Position

Accessing the Position Copy Window

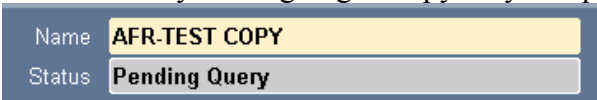

Step	Action
1	<p>Navigation Path → Work Structures → Position → Position Copy. The Position Copy window opens with two tabs, Original and New:</p> 

Continued on next page

Copying a Position, Continued

Entering Selection Criteria

You can copy a specific position or retrieve all positions that correspond to the criteria.

Step	Action
1	<p>In the Position Copy window, enter a unique name in the Name data field to identify the set of position(s) to be copied. Enter a name even if you are going to copy only one position.</p>  <p>For Example, use your initials, date, Position Title, etc.</p>
2	<p>The Effective Date populates with the current date.</p> <ul style="list-style-type: none"> It applies to all the positions that you query. If you do not enter a date, the system uses the current date. Change the Effective Date if you want a date that corresponds to the position to be copied.
3	<p>In the Position window click in Position Name data field.</p> 

Selecting a Position to Copy

There are several ways to query a position on the **Position Flexfield**.

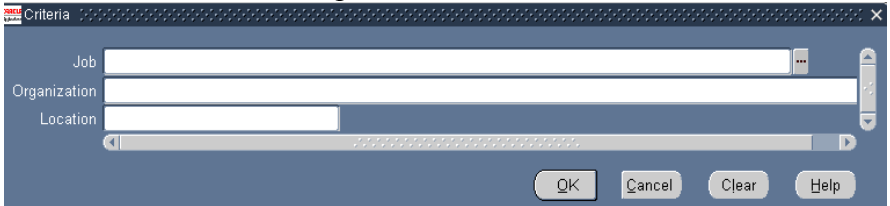
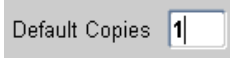
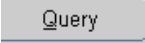

- Enter part of the data, with or without using the <**Combinations**> taskflow button:
 - Entering a **Sequence Number** produces only one position;
 - Entering a **Title** produces a list of all positions with that title;
- Enter information in all the data fields.

Continued on next page

Copying a Position, Continued

Query by Sequence Number


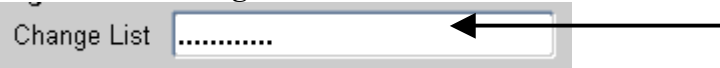
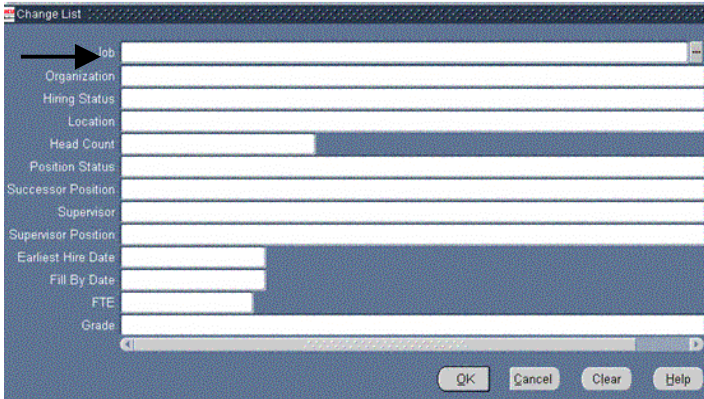
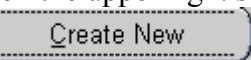
Follow these steps to retrieve a single position, using the *Sequence Number* of the position:

Step	Action
5	Enter the <i>Sequence Number</i> you wish to query and click the <OK> button.
6	<p>The Criteria Flexfield opens Click the <OK> button.</p> 
7	The Position Copy window opens with “Pending Query” in the <i>Status</i> data field at the top, and <i>Position Name</i> populates with the <i>Sequence Number</i> under the Selection Criteria .
8	<p>Enter the number of copies needed in the <i>Default Copies</i> data field.</p> 
9	Click the <Query> button. 
	<p>The Position Copy window displays the retrieved record(s) in the <i>Status</i> data field. The position data populates in the columns: Copies, Position Name, Status, Job Description, Organization Description, Hiring Status, etc.</p> <p> Note: The number of copies you entered displays under <i>Default Copies</i> data field and the Copies Column.</p>

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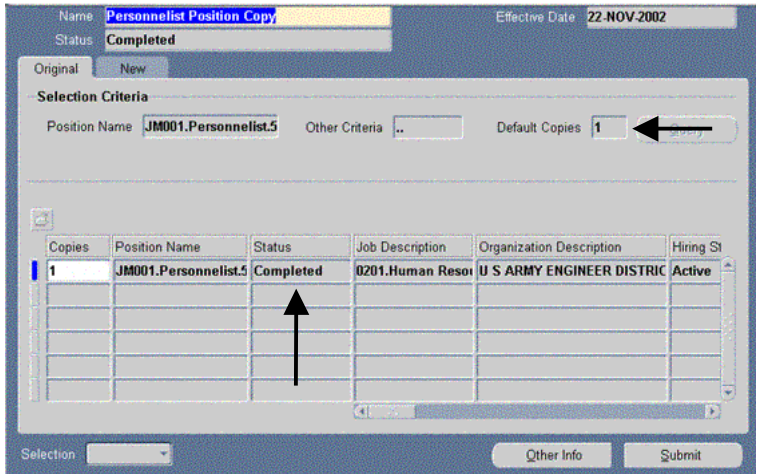
Copying a Position, Continued

Completing the Position Copy

Step	Action
10	Click on the New Tab. 
11	Click in the Change List data field. 
12	The Change List window opens: Change any of the data fields that apply to the new position(s). Click the < OK > button. 
12	After making all necessary changes click the< Create New > button on the upper right side of the window. 
13	A Note Message Box displays: “Pending record(s) created on New Tab.” Click the < OK > button.
14	The New window Tab displays the Position data populated in Position Name data field and the Columns populated with the number of positions to copy. The Status data field at the top populates with “Pending New Record(s).”
15	Click the < Submit > button at the bottom of the window.
16	A Note displays: Transaction applied and concurrent request (#) submitted. Click the < OK > button.
17	From the Position Window, retrieve the new positions and verify that all the data is correct.

Continued on next page

Copying a Position, Continued

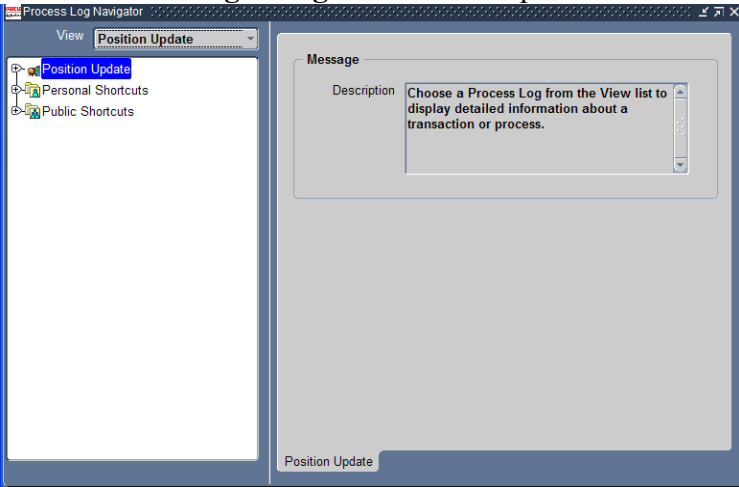
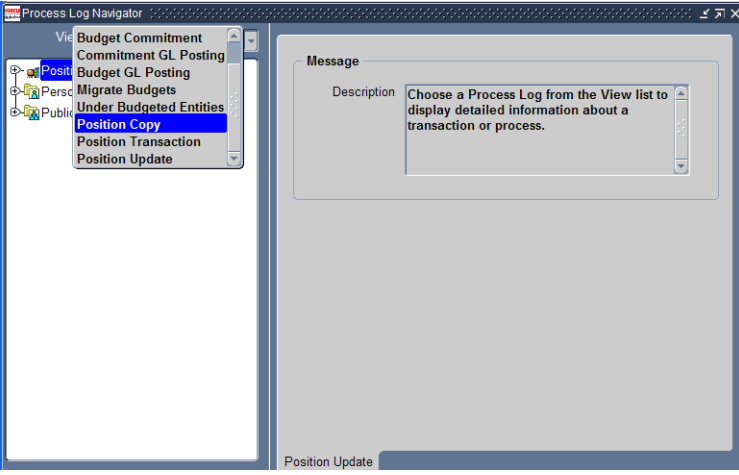
Step	Action
18	<p>If the position copy is in the status of “Error New Record(s),” follow procedures for Viewing the Process Log.</p> <ul style="list-style-type: none"> When the position copy is submitted, the system refreshes the position data with the exception of the Change List items and any manual changes you’ve made. It refreshes the data based on the <i>Effective Date</i>. The system validates the position using the same validation process it does when you create a position with the Position Window. <p>You can query the new position in the Position Window and continue making further changes, for example, in Position Extra Information.</p>
19	<p>Re-query the position copy name (Personnelist Position Copy) to refresh the status. Press F11, type in Personnelist%, CTRL+F11. The status changes to “Completed.”</p>  <p>The screenshot shows a software window titled 'Personnelist Position Copy'. At the top, 'Name' is 'Personnelist Position Copy' and 'Effective Date' is '22-NOV-2002'. Below, 'Status' is 'Completed'. There are tabs for 'Original' and 'New'. Under 'Selection Criteria', 'Position Name' is 'JMD01.Personnelist.5', 'Other Criteria' is '..', and 'Default Copies' is '1'. An arrow points to the 'Default Copies' field. Below this is a table with columns: Copies, Position Name, Status, Job Description, Organization Description, and Hiring St. The first row shows '1' in the Copies column, 'JMD01.Personnelist.5' in Position Name, 'Completed' in Status (with an arrow pointing to it), '0201.Human Resou' in Job Description, 'U S ARMY ENGINEER DISTRIC' in Organization Description, and 'Active' in Hiring St. At the bottom, there are buttons for 'Other Info' and 'Submit'.</p>

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Verifying the Position

Viewing the Process Log

If the status is “Error New Record(s),” use the **Process Log** to view the error message associated with the position copy. The **Process Log** also includes **Position Copy** transactions that completed successfully.

Step	Action
1	<p>Navigation Path → Federal Maintenance Forms → Process Log. The Process Log Navigator window opens:</p> 
2	<p>Under View, click on the drop down list to select Position Copy view.</p> 

Continued on next page

Verifying the Position, Continued

Step	Action
3	<p>Click on the plus sign (+) next to Position Copy to view the list of Position Copy transactions.</p> <ul style="list-style-type: none">• Green Light indicates “Copied”• Red Light indicates “Errors” <p>The error message is shown on the right under Message. This error is related to invalid data associated with the original Position being copied. You need to correct this information on the Position window, and then go back to Position Copy.</p> <ul style="list-style-type: none">• Re-query the Position Copy transaction that is in status of Error New Record(s).• On the Original Tab, click Query. This retrieves the original position with the correct data.• Click on New and continue with the position copy.
4	<p>You may delete a position copy transaction if the status is Pending New Record(s) or Error New Record(s). Once the status is Completed, you are not able to delete the transaction.</p>

Lesson 5: Copying a Position, continued



Begin the following exercises:

- Exercise 1 – Copying a Position

Approximately 25 minutes

NOTES

Lesson 5 Exercise 1: Copying a Position

Purpose Practice Position Copy to reduce time and effort required to create positions and ensure accurate data.

Directions Find the Position to copy, complete the New position and Validate.

8. **Navigation Path: Work Structures → Position → Position Copy.**
The **Position Copy** window has two tabs; **Original** and **New**.
9. In the **Position Copy** window, enter a unique name in the *Name* data field to identify a single or set of position(s) to be copied.
10. Find a position to copy.
11. Click in the New Tab.
12. Change some data in the Change List.
13. Click Create New button after making the data changes.
14. Click Submit.
15. Validate the new position by **Navigating to Federal Maintenance Forms → Process Log**.
16. Under **View**, click on the drop down list to select **Position Copy** view.
17. Click on the plus sign (+) next to **Position Copy** to view the list of **Position Copy** transactions.
Green Light indicates “Copy was Successful”
Red Light indicates “Errors”

NOTE: Refer back to the DEMO for detailed steps.

Estimated Time 25 min

Lesson 5: Copying a Position, continued



Key discussion point(s)

- You can copy up to five positions
- You must validate each new copied position
- You will need to query the position from the Position Window.
- You will need to know the position number, or other querying information (**Title, Sequence, Agency Group, or Position Type**) to retrieve the position to copy.
- It is now possible to copy invalid positions. Be sure the status is “Valid” before copying.

Review the objectives



Questions?

NOTES

Lesson 6: Workflow Inbox

NOTES



This lesson will introduce you to the Workflow Inbox. The Workflow Inbox is used to manage your RPA's and Notifications, i.e., HR updates, WFI Notices, etc.

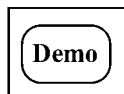


After this training, you will be able to:

- Choose which notifications to display and what information to display for those notifications.
- Create a personal Worklist view by defining a set of filtering criteria to determine what types of notifications and properties to display.
- Respond and reassign notifications.
- Perform searches to locate specific notifications.



Your system administrator must add the Workflow Inbox to the menu for a responsibility assigned to you before you can access it and view your Worklist.



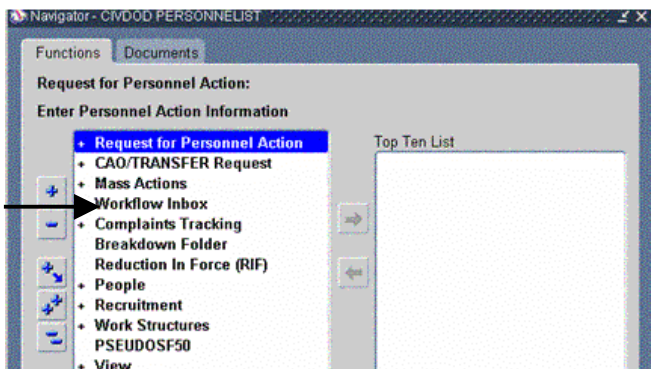
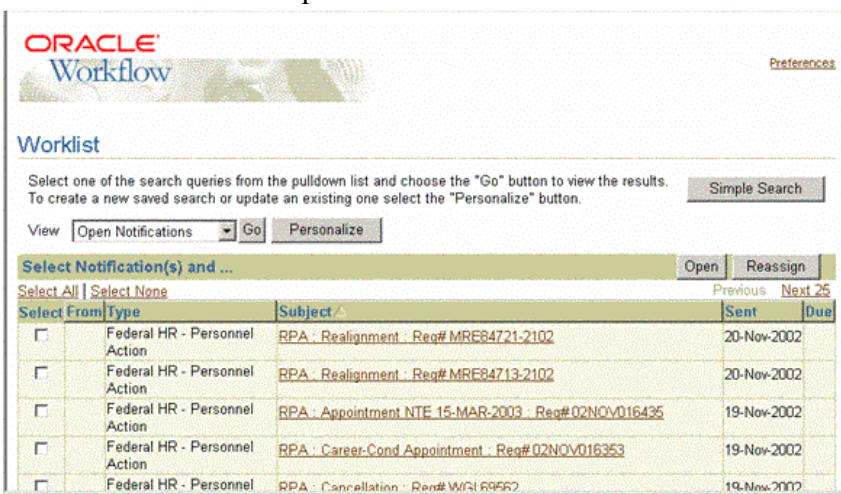
Turn to the Demo and observe while I:

- Review the Workflow Inbox.
- Perform a search on notifications.
- Personalize my view.
- Create routing rules.

DEMO

Workflow Inbox

Accessing the Workflow Inbox or Worklist

Step	Action
1	<p>Navigation Path → Workflow Inbox → Open.</p> 
Step	Action
2	<p>The Worklist window opens:</p> 

Continue on next page

Workflow Inbox, Continued

Worklist Window Description


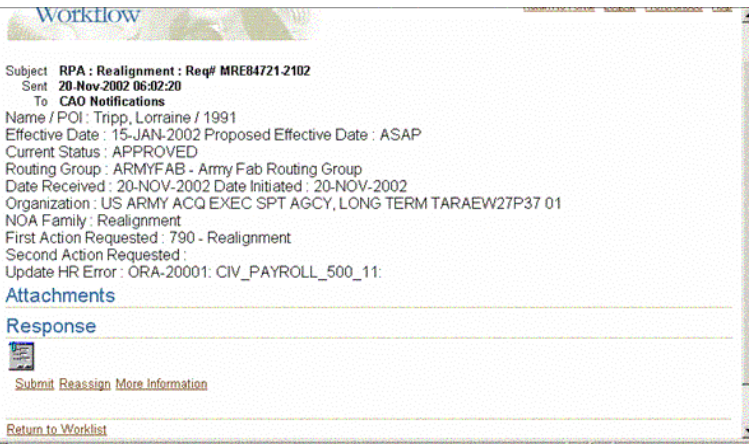
The features associated with this new inbox for viewing and responding to notifications are:

- Simple and advanced searches
- Customized views (Personalize)
- Open and reassign
- Creating routing rules to manage your notifications

Buttons/Links	Function	
Logout	To be developed.	
Preferences	Displays a General Preference Window – not currently used.	
Help	Assists with the window.	
View	List of preconfigured views.	
Go	Execute the search to review the results.	
Personalize	Creates a custom view	
Simple Search	Locates a one-time search of notifications that match your criteria	
Open	Opens the selected notification.	
Reassign	Currently not available.	
Select All	Selects all notifications on the current page using check boxes.	
Select None	Deselects notifications.	
Next	Allow you to view next 25 notifications for the preconfigured views. (Customized views can be set for a different number to view.)	
Columns	Allows you to sort the columns by clicking on the desired column. By default, the list is sorted by sent date from most recent to oldest, and then by subject in alphabetical order. For example, click on Subject and the notifications are sorted alphabetically by subject, i.e., all the cancellations are listed together, and all the corrections are listed together, by Sent date.	
	From	The role from which the notification was sent.
	To	The role to which the notification was sent.
	Type	Displays name of the item type of the notification: <ul style="list-style-type: none"> • Federal HR-Personnel Action (RPA), • OTA Training Request Forms.
	Subject	Description of the notification.
	Sent	Date when the notification was delivered.
	Due	Date by which the notification should be completed.
	Status	Shows “Open,” “Closed,” or “Cancelled.”

Workflow Inbox, Continued


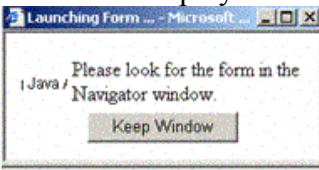
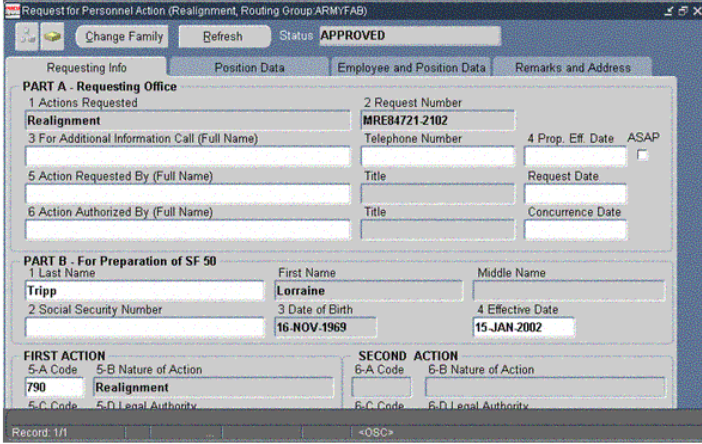

Viewing the Details of a Notification

Step	Action
1	<p>Navigate to the full details of a notification by clicking on the notification's underlined Subject link. Or check the select box and the click the <OPEN> button.</p> 
2	<p>The Notification Details window opens:</p> 

- If you revisit a notification to which you have already responded, the **Response** section indicates that the response has been submitted, and displays the response values that were submitted.
- If a notification does not require a response, the **Response** section indicates that as well. Choose the **Close** button in the **Response** section to close the notification so that it does not appear in your **Worklist** the next time you view your open notifications.



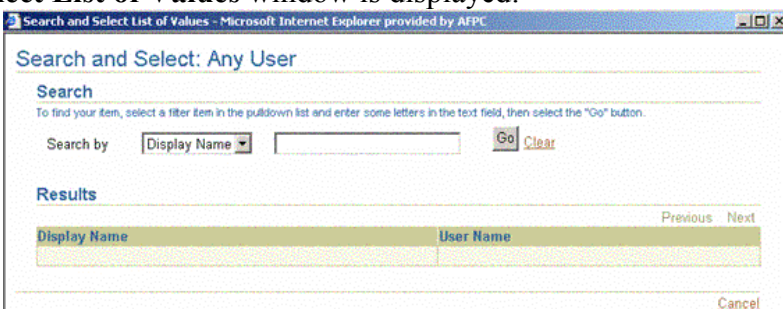
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Workflow Inbox, Continued

Step	Action
3	<p>Click on the attached form icon in the Response section to act on the notification.</p> 
4	<p>The Launching Form window displays:</p>  <p>You can choose <Keep Window> to continue displaying the launch window. Otherwise, this window automatically closes after 30 seconds.</p>
5	<p>The Request for Personnel Action form displays with the details of the selected notification.</p>  <p> Note: If the RPA does not open when selected, it might be “minimized” and you have to click on the Oracle Application at the bottom of your desktop to retrieve it.</p>
6	<p>Enter your information. Save and route the RPA. Or, if you need more information, close.</p>

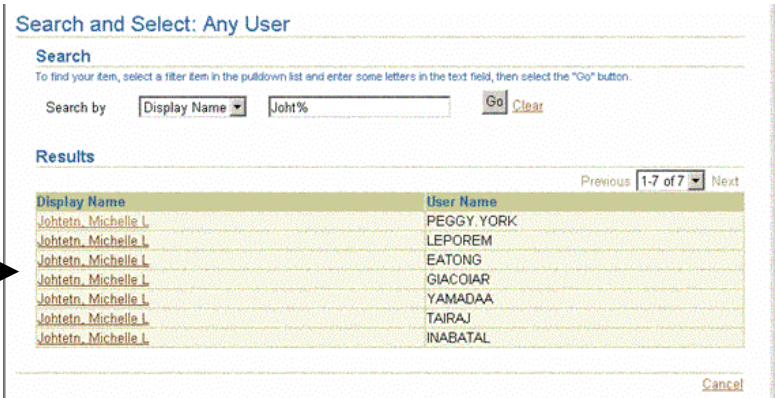

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Workflow Inbox, Continued

Step	Action				
7	<p>To request additional information for an RPA, click on the More Information link.</p> <p>Response</p>  <p>Submit Reassign More Information</p> <p>Return to Worklist</p>				
8	<p>The Request More Information window displays:</p>  <p>ORACLE Workflow</p> <p>Return to Portal Logout Preferences</p> <p>Subject RPA : Realignment : Req# MRE84721-2102</p> <p>Request More Information From <input checked="" type="radio"/> Workflow Participant <input type="radio"/> Any User</p> <p>* Information Requested</p> <p>Cancel Submit</p> <p>Return to Portal Logout Preferences</p> <p>Copyright 2001 Oracle Corporation. All rights reserved. Privacy Statement</p>				
9	<p>Select Any User, and click on the flashlight. The Search and Select List of Values window is displayed:</p>  <p>Search and Select List of Values - Microsoft Internet Explorer provided by AFPC</p> <p>Search and Select: Any User</p> <p>Search</p> <p>To find your item, select a filter item in the pulldown list and enter some letters in the text field, then select the "Go" button.</p> <p>Search by Display Name Go Clear</p> <p>Results</p> <table border="1"> <thead> <tr> <th>Display Name</th> <th>User Name</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> </tr> </tbody> </table> <p>Previous Next</p> <p>Cancel</p>	Display Name	User Name		
Display Name	User Name				

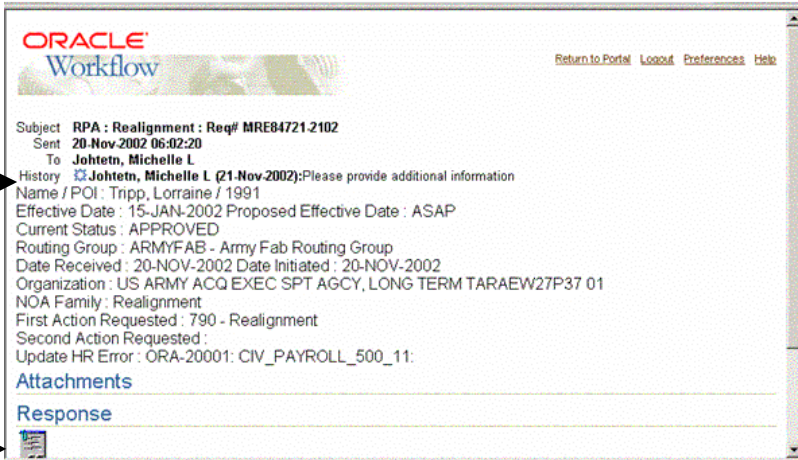
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Workflow Inbox, Continued

Step	Action																
10	<p>Choose Search By, Display Name on the drop down list, and enter a value for the display name using the wildcard (%) to search, if necessary. Click <Go> to view the results of the search.</p>  <p>The screenshot shows a search interface titled 'Search and Select: Any User'. Under the 'Search' section, there's a dropdown menu for 'Search by' set to 'Display Name' and a text field containing 'Johtn%'. A 'Go' button is next to the text field. Below this, the 'Results' section displays a table with two columns: 'Display Name' and 'User Name'. The table contains seven rows of data. An arrow points to the first row of the table.</p> <table border="1"> <thead> <tr> <th>Display Name</th><th>User Name</th></tr> </thead> <tbody> <tr> <td><u>Johtn, Michelle L</u></td><td>PEGGY YORK</td></tr> <tr> <td><u>Johtn, Michelle L</u></td><td>LEPOREM</td></tr> <tr> <td><u>Johtn, Michelle L</u></td><td>EATONG</td></tr> <tr> <td><u>Johtn, Michelle L</u></td><td>GIACOIAR</td></tr> <tr> <td><u>Johtn, Michelle L</u></td><td>YAMADAA</td></tr> <tr> <td><u>Johtn, Michelle L</u></td><td>TAIRAJ</td></tr> <tr> <td><u>Johtn, Michelle L</u></td><td>INABATAL</td></tr> </tbody> </table>	Display Name	User Name	<u>Johtn, Michelle L</u>	PEGGY YORK	<u>Johtn, Michelle L</u>	LEPOREM	<u>Johtn, Michelle L</u>	EATONG	<u>Johtn, Michelle L</u>	GIACOIAR	<u>Johtn, Michelle L</u>	YAMADAA	<u>Johtn, Michelle L</u>	TAIRAJ	<u>Johtn, Michelle L</u>	INABATAL
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11	<p>In the Results section, select a name by clicking on the underlined Display Name. The Request More Information window displays with the selected User Name. Enter your remarks in the Information Requested section. This datafield is required as indicated by the asterisk.</p>  <p>The screenshot shows the 'Request More Information' window. At the top, it says 'Subject RPA : Realignment : Req# MRE84721-2102'. Below that, 'Request More Information From' is set to 'Any User' with the selected user 'Johtn, Michelle L'. There's a section titled 'Information Requested' with a text area containing the placeholder 'Please provide additional information'. At the bottom right, there are 'Cancel' and 'Submit' buttons. An arrow points to the 'Submit' button.</p>																

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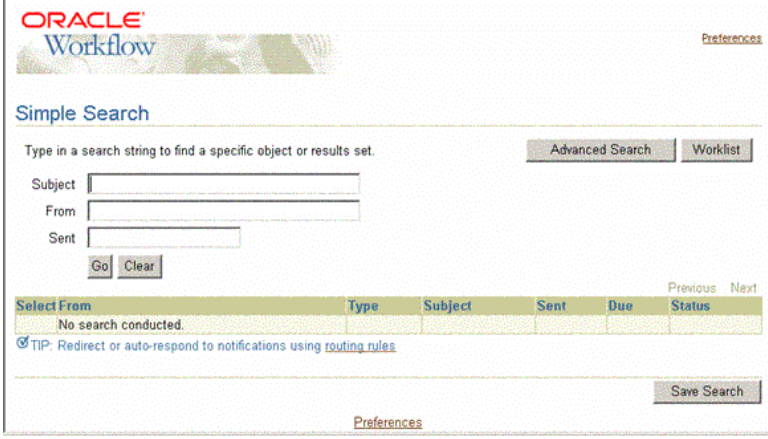

Workflow Inbox, Continued

Step	Action
12	<p data-bbox="537 443 1432 506">Click <Submit>. The request is sent to the specified user. The user opens up the notification and the following displays:</p> <div data-bbox="592 520 1385 976">  <p>The screenshot shows the Oracle Workflow notification details page. At the top, it says 'ORACLE Workflow'. Below that, it lists the notification details: Subject: RPA : Realignment : Req# MRE84721.2102, Sent: 20-Nov-2002 06:02:20, To: Johtetn, Michelle L. The History section shows a link to 'Johtetn, Michelle L. (21-Nov-2002): Please provide additional information'. Below that, it lists Name / POI: Tripp, Lorraine / 1991, Effective Date: 15-JAN-2002 Proposed Effective Date: ASAP, Current Status: APPROVED, Routing Group: ARMYFAB - Army Fab Routing Group, Date Received: 20-NOV-2002 Date Initiated: 20-NOV-2002, Organization: US ARMY ACQ EXEC SPT AGCY, LONG TERM TARA EW27P37 01, NOA Family: Realignment, First Action Requested: 790 - Realignment, Second Action Requested: , Update HR Error: ORA-20001: CIV_PAYROLL_500_11: There are links for Attachments and Response.</p> </div> <p data-bbox="537 1014 1432 1119">This History line shows who the request was sent to along with comments from the sender. The receiver then clicks on the Response Icon.</p> <p data-bbox="537 1125 1432 1339">You can also select <Cancel> to return to the previous page without sending the request. After you request more information for a notification, the notification does not appear in your Worklist as an open notification until the user responds to your request. However you can still view the notification by selecting the view Notifications From Me from the Worklist window.</p> <ul data-bbox="592 1381 1432 1747" style="list-style-type: none"> • If you do not want to wait for the additional information requested, you can respond to the notification using the Response section of the Notification Details page. In this case, your pending request is cancelled. • If you want to request more information from a different user, you can submit a new request using the <More Information> button in the Response section of the Notification Details page. In this case, your initial request is replaced by the new request, and only the user to whom you sent the new request can respond with more information.

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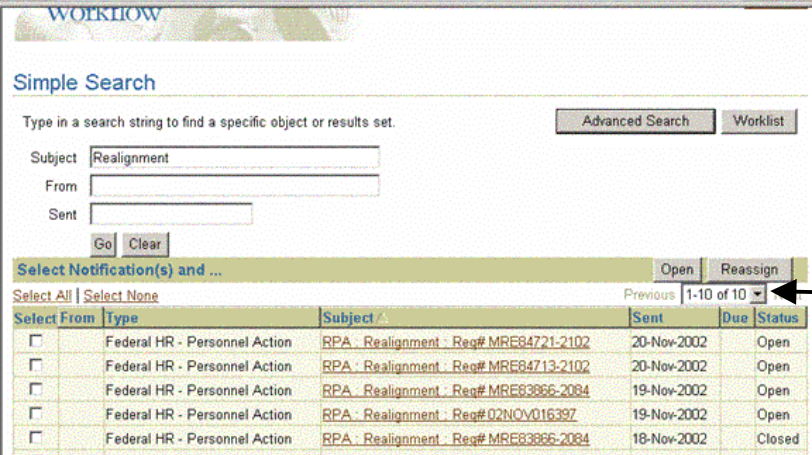
Workflow Inbox, Continued

Simple Search

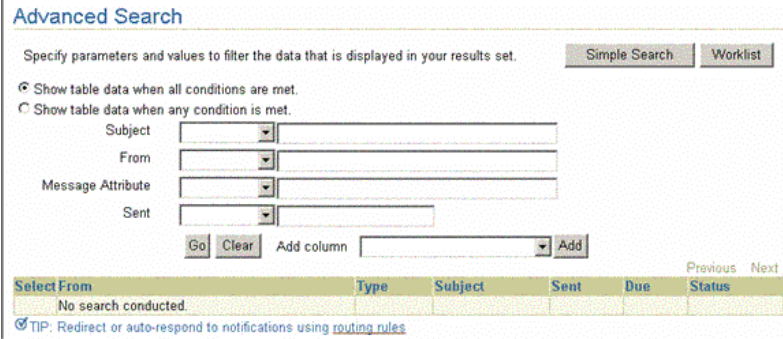
Step	Action
1	<p>On the Worklist Window, click the <Simple Search> button. The Simple Search window opens:</p> 
2	<p>Enter your search criteria to locate specific notifications. The search options are Subject, From, and Sent. The Simple Search window will displays with that search data field populated.</p> 
3	Click <Go> .

Continued on next page

Workflow Inbox, Continued

Step	Action
4	<p>The Simple Search window displays the notifications that match your criteria including those that are closed. Click <Save> to save your search for a future view. If this search does not provide enough parameters, you can go to the <Advanced Search> for additional features.</p>  <p>Note: The total number of records that match your criteria is indicated above the notifications list.</p>

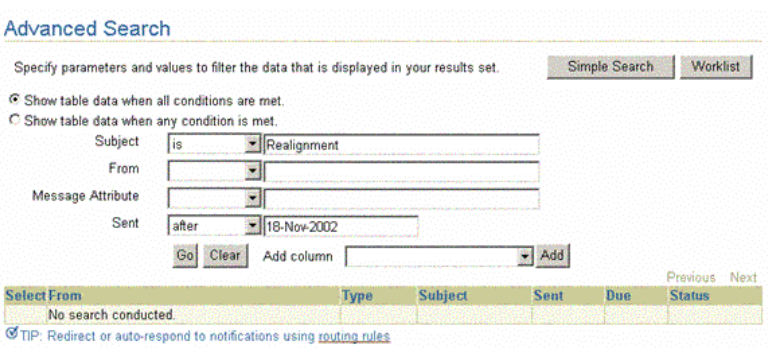
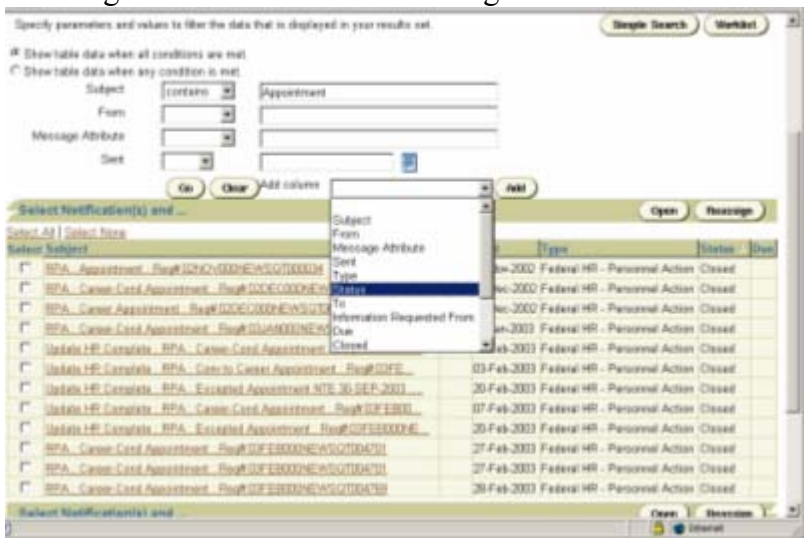
Advanced Search

Step	Action
1	<p>On the Simple Search window, click the <Advanced> button. The Advanced Search window opens:</p> 

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Workflow Inbox, Continued

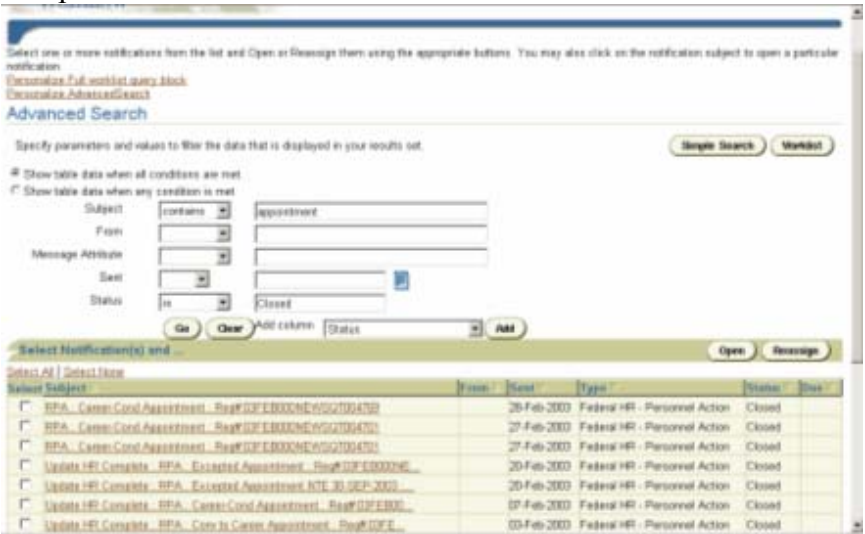
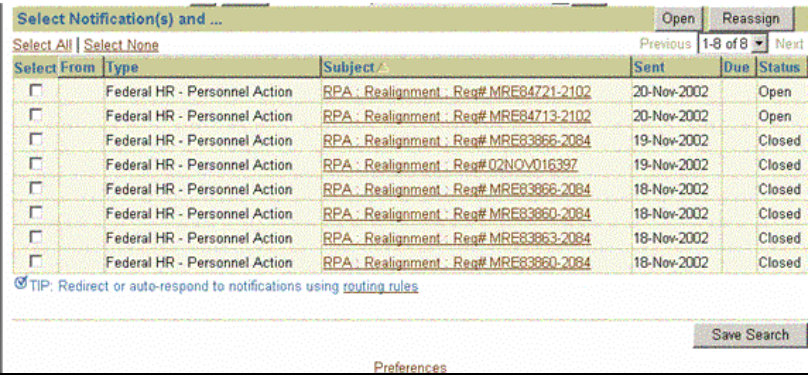
Advanced Search (continued)

Step	Action
2	<p>Select one of the options for locating specific notifications. Select one of the two radio buttons:</p> <ul style="list-style-type: none"> “Show table data when all conditions are met.” (Results in notifications that only met all of your criteria.) “Show table data when any condition is met.” (Results in notifications that match at least one of your search criteria.)
3	<p>To select notifications that meet all conditions, click the first radio button.</p> 
4	<p>You have the ability to add additional columns to your search by clicking on the drop down arrow beside the “Add column” field, selecting the desired field and clicking the Add button.</p> 

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Workflow Inbox, Continued

Advanced Search (continued)

Step	Action
4 (Cont)	<p>When the window repopulates you will see the selected field now as a part of the search criteria.</p> 
5	In the Subject drop down list, select “contains.”
6	Enter “Realignment” in the subject data field.
7	In the Sent drop down list, select “after” and enter the date.
8	<p>Click <Go>. The Advanced Search result displays:</p> 
9	<p>You can save this search criteria for future use by clicking the <Save Search> button at the bottom of the Worklist. The Create View window displays. Follow the procedures for creating a view if desired. See Personalized View in this section for details.</p>

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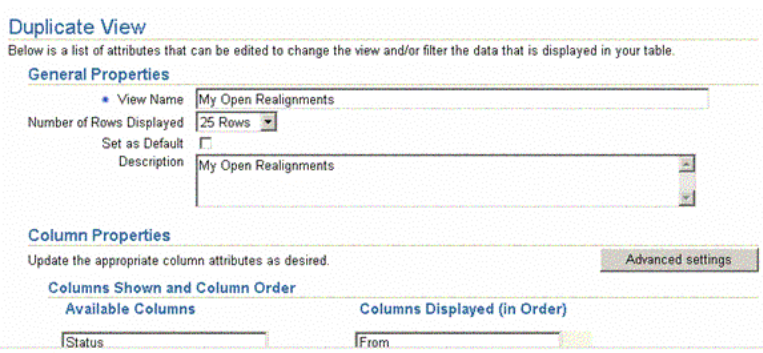

Workflow Inbox, Continued

Personalized View

Step	Action																								
1	<p>The Worklist window defaults to “Open Notifications.” There are four other preconfigured views on the drop down list:</p> <ul style="list-style-type: none">• All Notifications• FYI Notifications (Includes those not routed for approval)• Notifications From Me (Only those you generated)• To Do Notifications (Require actions) <p>Worklist</p> <p>Select one of the search queries from the pulldown list and choose the “Go” button to view the results. To create a new saved search or update an existing one select the “Personalize” button.</p> <p>View: Open Notifications Go Personalize Simple Search</p> <p>Select Select A Select Select Open Notifications To Do Notifications Open Reassign Previous Next 25</p> <table><thead><tr><th></th><th>Subject</th><th>Sent</th><th>Due</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>Workflow Training Request Awaiting Approval</td><td>20-Nov-2002</td><td></td></tr><tr><td><input type="checkbox"/></td><td>Federal HR - Personnel Action Update HR Complete - RPA - Ext of Promotion NTE 31-AUG-2002 - Reg# 02NOV016558</td><td>20-Nov-2002</td><td></td></tr><tr><td><input type="checkbox"/></td><td>Federal HR - Personnel Action Update HR Complete - RPA - Promotion NTE 31-JUL-2002 - Reg#</td><td>20-Nov-2002</td><td></td></tr></tbody></table>		Subject	Sent	Due	<input type="checkbox"/>	Workflow Training Request Awaiting Approval	20-Nov-2002		<input type="checkbox"/>	Federal HR - Personnel Action Update HR Complete - RPA - Ext of Promotion NTE 31-AUG-2002 - Reg# 02NOV016558	20-Nov-2002		<input type="checkbox"/>	Federal HR - Personnel Action Update HR Complete - RPA - Promotion NTE 31-JUL-2002 - Reg#	20-Nov-2002									
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2	<p>Use any of the preconfigured views, or create your own view. Click the <Personalize>button. The Personal Worklist Views window opens:</p> <p>Personal Worklist Views</p> <p>Below is a list of all pre-configured and/or personalized views applicable to “Worklist” table on the previous screen.</p> <p>Select View and ... Update Delete Duplicate Previous 1-5 of 5 Next</p> <table><thead><tr><th>Select View Name</th><th>Description</th><th>Last Update Date</th><th>Default</th></tr></thead><tbody><tr><td><input type="radio"/> All Notifications</td><td></td><td>01-Oct-2002</td><td>No</td></tr><tr><td><input type="radio"/> FYI Notifications</td><td></td><td>01-Oct-2002</td><td>No</td></tr><tr><td><input type="radio"/> Notifications From Me</td><td></td><td>01-Oct-2002</td><td>No</td></tr><tr><td><input type="radio"/> Open Notifications</td><td></td><td>01-Oct-2002</td><td>No</td></tr><tr><td><input type="radio"/> To Do Notifications</td><td></td><td>01-Oct-2002</td><td>No</td></tr></tbody></table> <p>Return to Worklist Preferences Help Create View</p>	Select View Name	Description	Last Update Date	Default	<input type="radio"/> All Notifications		01-Oct-2002	No	<input type="radio"/> FYI Notifications		01-Oct-2002	No	<input type="radio"/> Notifications From Me		01-Oct-2002	No	<input type="radio"/> Open Notifications		01-Oct-2002	No	<input type="radio"/> To Do Notifications		01-Oct-2002	No
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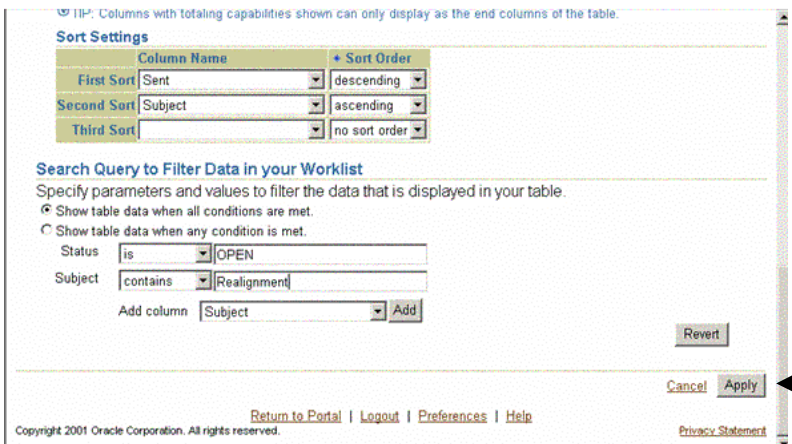

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Workflow Inbox, Continued

Step	Action
3	<ul style="list-style-type: none"> You can duplicate one of the preconfigured views by selecting one of the views and clicking the <Duplicate> Button. Or you can create your own view, by clicking on the Create View Link at the bottom of the window.
4	<p>To duplicate a preconfigured view, select the view to duplicate, i.e. Open Notifications. Click the <Duplicate>. button The Duplicate View window opens:</p> 
5	<p>In the General Properties section, enter a View Name, Number of Rows to be displayed, and a Description. If you would like this view to be the default view when opening the Worklist, check the Set as Default box (currently not working.)</p> <p>Under Column Properties, update the columns to be displayed, and the order in which they are displayed, as needed.</p> 



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Workflow Inbox, Continued

Step	Action
6	<ul style="list-style-type: none"> Use the Sort Settings section to modify any of the default settings for your custom view. To specify additional parameters and values to filter data, make changes in the Search Query to Filter Data in your Worklist section.  <p>Click on the <Apply> button when finished to save the new view.</p>
7	<p>The Personal Worklist Views Window displays, and the list of views now includes the new custom view, My Open Realignments. Click on the Return to Worklist link to select and view the results of My Open Realignments.</p> 

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Workflow Inbox, Continued

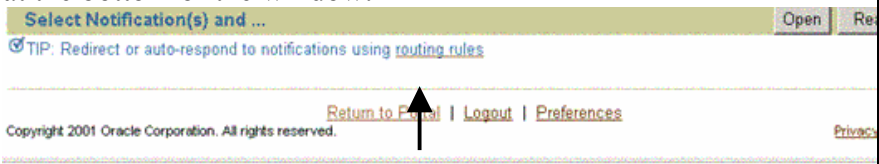
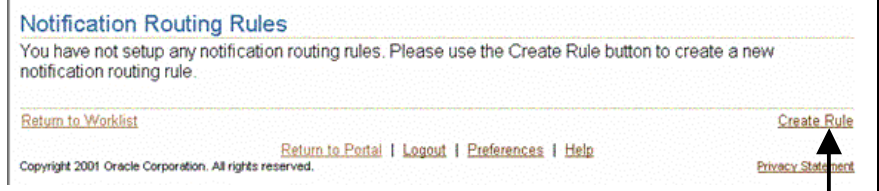

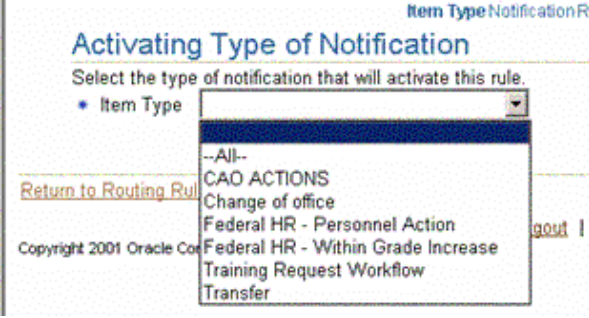

Step	Action
8	<p>After selecting My Open Realignments view, the results display:</p>  <p>The screenshot shows the 'Worklist' window. At the top, there's a search bar with 'My Open Realignments' selected. Below it, there's a table with columns: 'Select From', 'Type', 'Subject', 'Sent', and 'Due'. The table contains two rows of data. At the bottom, there are buttons for 'Open' and 'Reassign'.</p>
9	<p>To create your own custom view, click on the <Personalize> button from the Worklist window. The Personal Worklist Views window opens.</p>  <p>The screenshot shows the 'Personal Worklist Views' window. It has a table with columns: 'Select View Name', 'Description', 'Last Update Date', and 'Default'. There are several rows of data. At the bottom right, there is a link labeled 'Create View' which is underlined and pointed to by an arrow.</p> <p>Click on the underlined Create View link.</p>
10	Follow the instructions for Duplicate view (Steps 4 – 6), to create a new custom view.

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Workflow Inbox, Continued

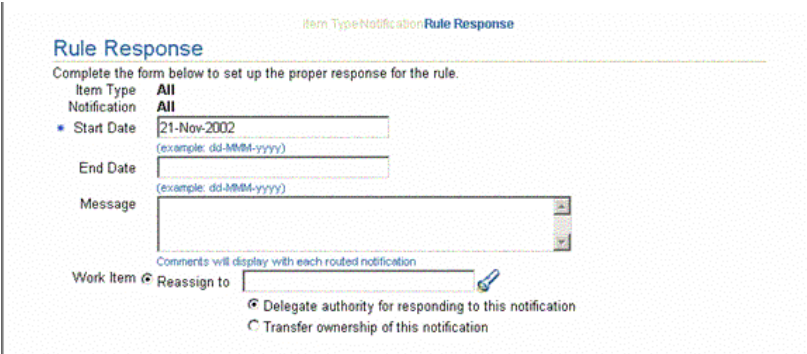


Creating Routing Rules

You can create customized routing rules for automatic notification processing. For example, you can route certain types of notifications to a co-worker for coordination.

Step	Action
1	<p>On the Worklist window click the underlined routing rules link at the bottom of the window:</p>  <p>The screenshot shows the bottom of a web page with a yellow bar containing 'Select Notification(s) and ...' and 'Open' and 'Res' buttons. Below this is a blue tip: 'TIP: Redirect or auto-respond to notifications using routing rules'. At the bottom, there are links: 'Return to Portal', 'Logout', 'Preferences', and 'Privacy Statement'. An arrow points to the 'Return to Portal' link.</p>
2	<p>The Notification Routing Rules window opens:</p>  <p>The screenshot shows a window titled 'Notification Routing Rules'. It contains the text: 'You have not setup any notification routing rules. Please use the Create Rule button to create a new notification routing rule.' At the bottom, there are links: 'Return to Worklist', 'Return to Portal', 'Logout', 'Preferences', 'Help', 'Create Rule', and 'Privacy Statement'. An arrow points to the 'Create Rule' link.</p>
3	<p>Click on the underlined Create Rule. The Activating Type of Notification window opens:</p>  <p>The screenshot shows a window titled 'Activating Type of Notification'. It contains the text: 'Select the type of notification that will activate this rule.' Below this is a dropdown menu labeled 'Item Type' with a downward arrow. Below the dropdown is the text: 'If "--All--" is selected, you will skip to Step 3.' At the bottom, there are links: 'Return to Routing Rules', 'Return to Portal', 'Logout', 'Preferences', 'Help', 'Step 1 of 3 Next', and 'Privacy Statement'.</p>
4	<p>Choose a type of notification from the drop down list:</p>  <p>The screenshot shows the same window as in Step 3, but the 'Item Type' dropdown menu is open, showing a list of options: '--All--', 'CAO ACTIONS', 'Change of office', 'Federal HR - Personnel Action', 'Federal HR - Within Grade Increase', 'Training Request Workflow', and 'Transfer'. An arrow points to the 'CAO ACTIONS' option.</p> <p> Note: If you choose “All” you can skip to Step 3 Next at the lower right corner.</p>

Continued on next page

Workflow Inbox, Continued

Step	Action
5	<p>Click the <Next> button. The Rule Response window opens:</p> 
6	<p>Enter values in the Start Date and End Date fields to specify the period that this rule should be active.</p> <ul style="list-style-type: none"> • If you leave the Start Date blank, the rule is effective immediately. • If you leave the End Date blank, the rule is effective indefinitely. <p> CAUTION: Since you can define different rules for the same notifications to be effective at different time, the system allows you to define multiple rules for the same notifications.</p> <ul style="list-style-type: none"> • You should be careful to ensure that rules for the same notifications do not overlap in their effective dates. • If multiple rules are effective for the same notification, Workflow picks one rule at random to apply.
7	<p>In the Message field, enter any text that you want to append to the notification when the rule is applies.</p> <p> Note: “Reassign to” is currently under development.</p>
8	<p>Choose:</p> <ul style="list-style-type: none"> • <Submit> to save the rule, • <Cancel> to return to the Worklist without creating or updating the rule, or, • <Back> if you are creating a new rule, to return to the previous page.

Lesson 6: Workflow Inbox, continued



Begin the following exercise:

- Exercise 1 – Worklist Window Description,
- Viewing Details of a Notification,
- Simple Search,
- Advanced Search,
- Personalized View,
- Creating Routing Rules

Approximately 45 minutes

NOTES

Lesson 6 Exercise 4: WorkFlow Inbox

Purpose	Practice working within the workflow inbox and personalizing the worklist views.
<hr/>	
Directions	<p>Complete the following steps below.</p> <ul style="list-style-type: none">• Navigate to the workflow in box.• Create a simple search• Create an advanced search identifying only open actions in your inbox• Save and Customize the advance search in the above step• Rename columns headings• Reorder the column headings in the following sequence<ul style="list-style-type: none">• Status• Type• Subject• Due• Notification ID• Sent• Sort by Subject in ascending order• Save

***NOTE:** Refer to Demo for detailed steps*

Estimated Time 30 minutes.

Lesson 6: Workflow Inbox, continued



Key discussion point(s)

- Saving search criteria to view and repeat at a later date.
- Defining automatic notification routing rules.
- Importance of responding to notices timely and maintenance.

Review the objectives



Questions?

NOTES